

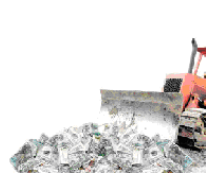


CLIENT WEBINAR SERIES

Time to Reach New Heights

Bookmarks: Oh, The Things You Can Do

Feb 12, 2015



Agenda

The Basic Steps

- Bookmark Basics
 - Where to find them
 - How to use them
 - How to format with prefixes
 - Text
 - Dates
 - Numbers
 - Contact Bookmarks
 - xxxAddr_xxx

Advanced

- xBookmarks
 - xSort
 - xFilter
 - xShowData
 - xSendDetails
- WordTemplateConfig
 - Create New Bookmarks
 - qAlias Bookmarks
 - Distributed by Spitfire
 - Create your own



Where to Find Them

- Focus Guide: Bookmark Templates
- <http://support.spitfirepm.com/2015/01/31/documentation/>
- Help Menu | Focus Guides

- UI Configuration (formerly Customization)

- xShowData

Focus Guide

Bookmark Templates

Document Header

Bookmark Name

- DocHeader_DocNo
- DocHeader_Project
- DocHeader_Title
- DocHeader_SourceContract
- DocHeader_OwnerApprover
- DocHeader_ResponsiveParty
- DocHeader_SubType
- DocHeader_ContractType
- DocHeader_Status
- DocHeader_Signoff
- DocHeader_DocDate
- DocHeader_SourceDocNo
- DocHeader_Source
- DocHeader_Due
- DocHeader_SourceDate
- DocHeader_Probability
- DocHeader_Compliance
- DocHeader_Reason
- DocHeader_ProjectContractName
- DocHeader_Subcontract
- DocHeader_Reason

UI CONFIGURATION TOOL

Part Name	Doc Type	Context	Capability	Item	Label	Visible	RO	Length	Seq	Lookup	Format	H
Doc Item Detail - Commitment, RFQ	Vendor Commitment			GL Account		✓	×					
Doc Item Detail - Commitment, RFQ	Vendor Commitment			Subaccount (GL)		✓	×					
Doc Item Detail - Commitment, RFQ	Vendor Commitment			R4								

Generated/Updated Office Document for SF GC-003 Fixed Price 0004

Vendor Commitment: 15000 Mechanical (GC003, #0004)

Processing Summary

- Run#: 5; Total Time: 0.542 seconds;
- sfPMS Version: 4.5.5512.38117
- Replacement Digest: is new
- Bookmarks: 40
- DocMasterKey: c61cbb40-71dc-
- Notifications: ForceShowAndSe
- New Digest
- MD5: 3A38063A0B9EC
- SHA512: CDAB39014F878
- Map Size: 1414

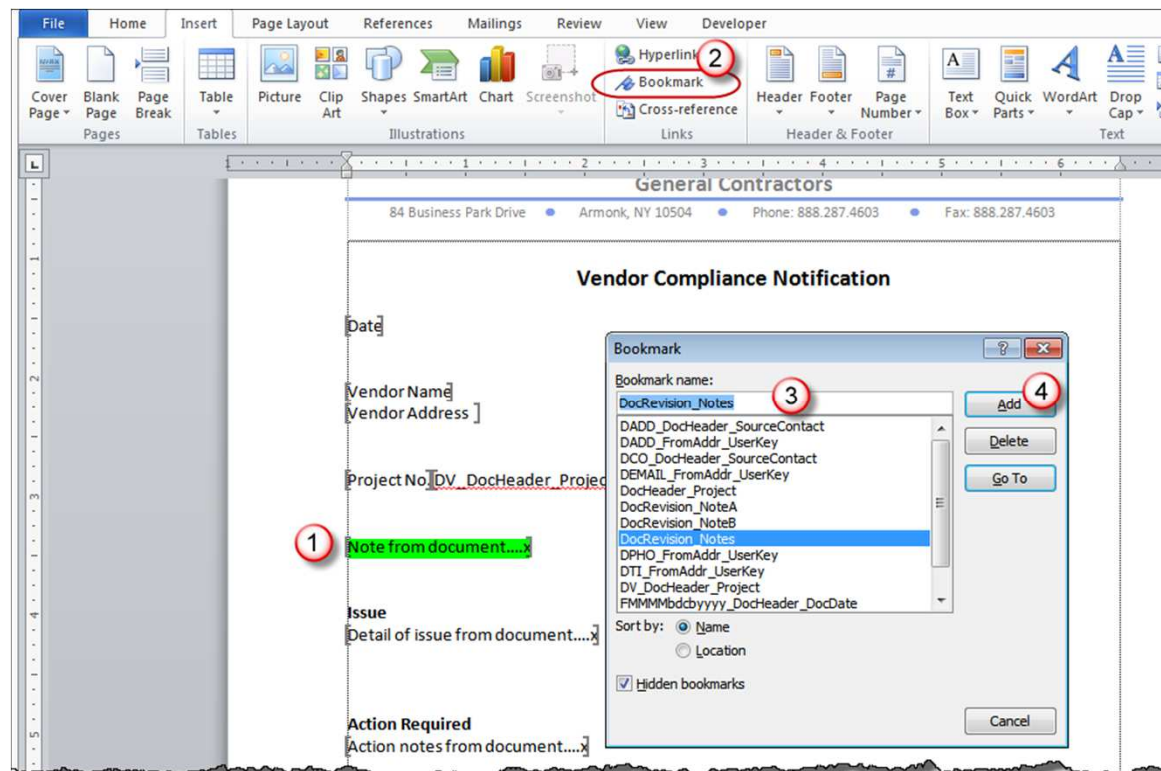
Bookmarks Replacements:

[Fdd_DocHeader_DocDate]=07;
[FMMMM_DocHeader_DocDate]=Feb;
[Fyyyy_DocHeader_DocDate]=2015;
[FD_DocHeader_ProjectFinishDate]=F;
[OwnerAddr_Company]=Northern Light
[OwnerAddr_AddrBlock]=1234 River
[SrcConAddr_Company]=Universal Me



How to Use Them

1. Highlight the place in the document where you want the merged data to print
2. Click Insert Bookmark
3. Type the Bookmark Name
4. Click Add



How to Format - Text

- Description Value DV_
 - DocHeader_Status = I
 - DV_DocHeader_Status = In Process
- Doc Mask DM_
 - DocHeader_Project = GC003
 - DM_DocHeader_Project = GC-003
- Plain Text FPT_
 - DocRevision_Notes = Meeting at **4:00**
 - FPT_DocRevision_Notes = Meeting at 4:00
- Repeat Rows RR_
 - DocItem_Description = 1 row
Electrical Panel
 - RR_DocItem_Description = all the rows
Electrical Panel
CAT 5 Wiring
Auto Switches for Interior Lighting
Outdoor Lighting with Auto Sensors



How to Format - Dates

Predefined

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

For example,

DocHeader_DocDate = Monday, June 11, 2014 1:00:00 PM

Fd_DocHeader_DocDate = 6/11/2014

FS_DocHeader_DocDate = 6/11/2014 1:00 PM

FG_DocHeader_DocDate = 6/11/2014 1:00:00 PM

FD_DocHeader_DocDate = Monday, June 11, 2014

FM_DocHeader_DocDate = June 11

FR_DocHeader_DocDate = Fri, 11 Jun 2014 13:00:00 GMT

FT_DocHeader_DocDate = 1:00:00 PM

FU_DocHeader_DocDate = Monday, June 11, 2014 1:00:00 PM

FY_DocHeader_DocDate = June, 2014

Create Your Own

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 in 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)	:

Just the day: Fdddd_DocHeader_DocDate = Monday

Just the year: Fyyyy_DocHeader_DocDate = 2014



How to Format - Numbers

DocItem_OriginalQuote = 1000.000

DocRevision_TaxRate = .0812

FCx_ for currency

FC_DocItem_OriginalQuote = \$1,000.00

FPx_ for percentages

FP1_DocItem_OriginalQuote = 8.1%

FNx_ for numbers with commas:

FN0_DocItem_OriginalQuote = 1,000

FFx_ for numbers without commas:

FF1_DocItem_OriginalQuote = 1000.0

FDTX_ for Dollar Text

FDTX_DocItem_OriginalQuote = One thousand and zero/100

FNTX_ for Plain Text

FNTX_DocItem_OriginalQuote = One thousand



Contact Bookmarks

Step 1: Find the Base `xxxAddr_`

Step 2: Decide on the Specific Option

- Name
- Company
- Title
- And on and on....

Step 3: Combine

- PMAddr_Company
- PMAddr_Phone
- DTI_PMAddr_UserKey

Two Options:

- Field
- Prefix



HTML Field for Logo / Signature

KBA-01586: Embedding Images in HTML fields


admin | December 8, 2014

Question 1) How do I embed an image into the HTML editor in Chrome? 2) Why do I get a little red box in Microsoft Word instead of the image I pasted into the HTML editor? Answer IE usually does these...

[READ MORE](#)

- Company Logo = qlmg_Logo

COMPANY DIVISION DETAIL																
	Division ID	Company Name	Address	Address	City	State	Zip	Country	Phone	Fax	Site	Logo	Hdr	Foot	Active	Main
	CAI	Spitfire America, Inc.	84 Business Park Drive	Suite 200	Armonk	NY	10504		(888) 287-4603	(888) 287-4603					✓	✓
	CBS	Spitfire Business Solutions	84 Business Park Drive	Suite 200	Armonk	NY	10504		(888) 287-4603	(888) 287-4603					✓	×
	CCC	Spitfire Construction Inc.	84 Business Park Drive	Suite 200	Armonk	NY	10504		(888) 287-4603	(888) 287-4603	spi...	...			✓	×
	CDI	Spitfire Distribution, Inc.	84 Business Park Drive	Suite 200	Armonk	NY	10504		(888) 287-4603	(888) 287-4603					✓	×
	CEC	Spitfire Engineering, Inc.	84 Business Park Drive	Suite 200	Armonk	NY	10504		(888) 287-4603	(888) 287-4603					✓	×
	CEI	Spitfire Entertainment, Inc.	84 Business Park Drive	Suite 200	Armonk	NY	10504		(888) 287-4603	(888) 287-4603					✓	×
	CHC	Spitfire Highway Construction	84 Business Park Drive	Suite 200	Armonk	NY	10504		(888) 287-4603	(888) 287-4603					✓	×
	CHS	Spitfire HVAC Services, Inc.	84 Business Park Drive	Suite 200	Armonk	NY	10504		(888) 287-4603	(888) 287-4603					✓	×
	CMI	Spitfire Manufacturing, Inc.	84 Business Park Drive	Suite 200	Armonk	NY	10504		(888) 287-4603	(888) 287-4603					✓	×
	MAIN	Rapid Byte Solutions	7 Skyline Drive												✓	×



- Internal Contact's Signature = DSIG_xxxAddr_UserKey

Name	Company	Email	Phone	Fax	Type	Ext ID
Chris Demo	Spitfire Construction	support@spitfireman...				

General Address Member Of Connections Notification Cor

PHONE (888) 287-4603

CELL (203) 952-6552

PAGER

FAX (888) 287-4603

IM HANDLE

ORGANIZATIONAL LEVEL 0

URL

SUPPRESS E-MAIL NOTICES UNTIL:

Signature: ...



xSort and xFilter Bookmarks

BookmarkName

(Enter this in Insert Bookmark)
This tells it what to do...

Bookmark

(but highlight this)
...using these parameters

xSort

- xSort_DocItem ItemType
- xSort_DocItem ItemStatus,ItemType

xFilter

- xFilter_DocItem ItemType='S'
- or if you have multiple tables
- xFilterTable1_DocItem ItemType='S'
 - xFilterTable1_DocItem ItemType='P'

Important Note:

Use straight single quote '
 Curly quotes won't work ‘



xShowData and xSendDetails

WordTemplateConfig options

- xShowData – provides a list of all possible data you template can pull from the database
- xSendDetails – Sends an email with Template Info to the specified email address
- Both can be filtered by Doc Type

RULE MAINTENANCE

GROUP: ☐ SHOW CODE SET

Rule Group	Filter Info	Type	Description
WordTemplateConfig	DocTypeKey	String	Allows centralized maintenance of certain features in Word document templates ?

RULE ENTRIES

RULE NAME: DOC TYPE:

☒ SITE ONLY

Rule	Filter Value	Result Value	SF
xShowData		✓	X
xSendDetails		dmcgovern@spitfiremanagement.com	X



Create a Bookmark - WordTemplateConfig

Example: List of Attendee's Name and Company

Problem: In a 2 column table, some of the Names and Companies are very long and some are short

Name	Company
William John Bertolussi	IBM
Jim Wade	Hartman, Smith, Wade and Associates

Create a bookmark to combine both fields into one bookmark

DocAttendee:NameCo '[DocAttendee_UserKey], [DCO_ DocAttendee_UserKey]'
DocAttendee:FieldList NameCo

Name, Company

William John Bertolussi , IBM

Jim Wade, Hartman, Smith, Wade and Associates



Create a Bookmark - WordTemplateConfig

Example:

If the user selects C, print “California Subcontract Terms Apply” in this location – if not, leave the space blank.

Create a bookmark for the location of this text (or blank).

```
DocRevision.Supp      IIF(DocRevision.csString016 = 'C',  
                        'California Subcontract Terms Apply',' ' )  
DocRevision:FieldList  Supp
```



qAlias Bookmark

- Takes Bookmarks to a new level
- Breaks the Boundary that Bookmarks only apply to data on this document
- Two methods:
 - Enter Query directly into WordTemplateConfig



RULE MAINTENANCE				
GROUP:		<input type="checkbox"/> SHOW CODE SET		
Rule Group	Filter Info	Type	Description	
WordTemplateConfig	DocTypeKey	String	Allows centralized maintenance of certain features in Word document templates?	
RULE ENTRIES				
RULE NAME: qPro		DOC TYPE: <input type="text"/>		
<input checked="" type="checkbox"/> SITE ONLY				
Rule	Filter Value	Result Value	SF	
qProjInfo:Alias		SELECT TOP 1 ExternalDocNo as Contract, Source as ConsPhse, csString030 as MarketSeg, \$+ /	X	
qProjInfo:Alias.01		csString060 as Special, Section as Section, DaysRequested as PerfDays, dbo.f_DescribeCode('Source',	X	
qProjInfo:Alias.02		dh.source,\$+ /	X	
qProjInfo:Alias.03		'EE06ED1B-0329-4154-81A7-756C281EBD93') as ConsPhseName FROM dbo.xsfDocHeader dh \$+ /	X	
qProjInfo:Alias.04		JOIN dbo.vsf_RevisionInfo vri on vri.DocMasterKey = dh.DocMasterKey JOIN dbo.xsfDocRevision dr on \$+ /	X	
		dr.DocRevKey = vri.DocRevKey WHERE dh.Project = @pProject and dh.DocTypeKey = 'EE06ED1B-0329-4154-81A7-756C281EBD93' /	X	

- Create a Stored Procedure with the Query and enter name of Stored Procedure in Word TemplateConfig

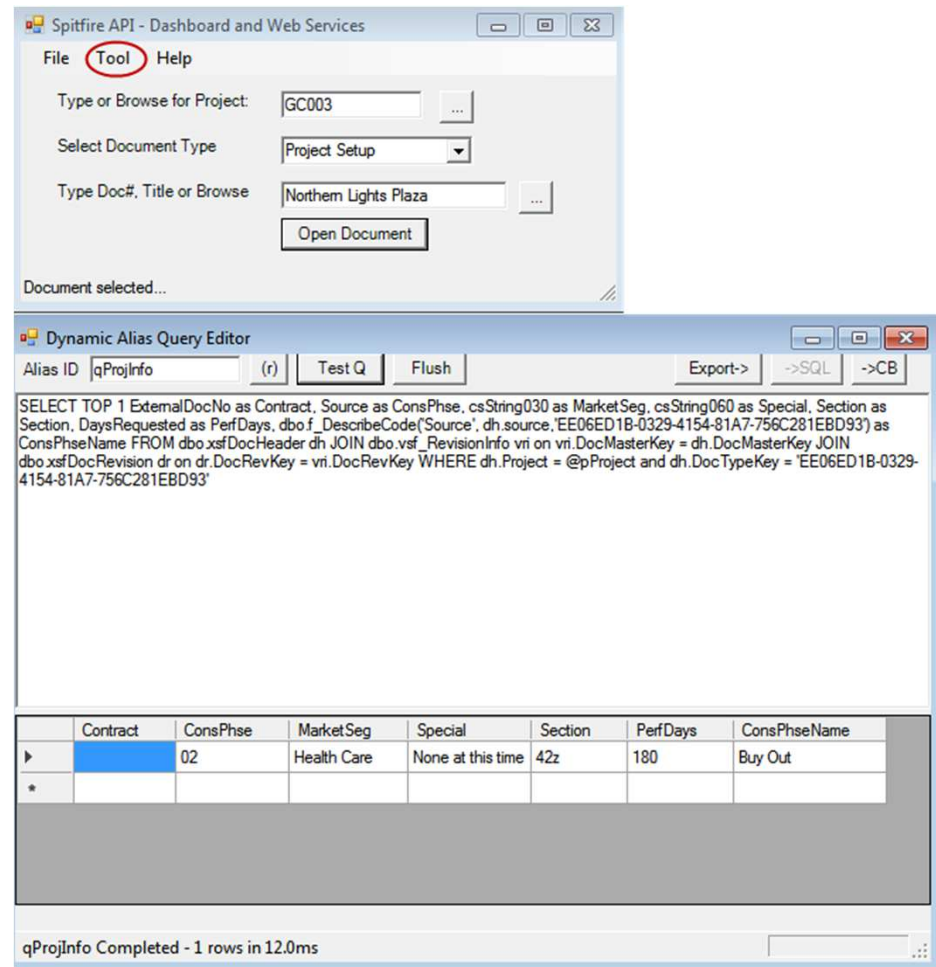


RULE MAINTENANCE				
GROUP:		<input type="checkbox"/> SHOW CODE SET		
Rule Group	Filter Info	Type	Description	
WordTemplateConfig	DocTypeKey	String	Allows centralized maintenance of certain features in Word document templates?	
RULE ENTRIES				
RULE NAME: qTeam		DOC TYPE: <input type="text"/>		
<input type="checkbox"/> SITE ONLY				
Rule	Filter Value	Result Value	SF	
qTeam:Alias		exec dbo.pqa_ProjectTeam @pProject /	✓	



Spitfire API Tool

- In Spitfire API tool
- Choose a Project
- Choose a Doc Type
- Select the specific document
- Open Document
- From the Tool menu, select qAlias tool.
- Enter the name of your qAlias
- Click Test



The screenshot shows the Spitfire API tool interface. The top window is titled "Spitfire API - Dashboard and Web Services" and has a menu bar with "File", "Tool", and "Help". The "Tool" menu is circled in red. Below the menu bar, there are input fields for "Type or Browse for Project:" (containing "GC003"), "Select Document Type:" (a dropdown menu showing "Project Setup"), and "Type Doc#, Title or Browse:" (containing "Northern Lights Plaza"). There is an "Open Document" button. Below these fields, it says "Document selected...".

The bottom window is titled "Dynamic Alias Query Editor". It has a toolbar with buttons for "Alias ID", "Test Q", "Flush", "Export->", "->SQL", and "->CB". The "Alias ID" field contains "qProjInfo". Below the toolbar, there is a text area containing a SQL query:

```
SELECT TOP 1 ExternalDocNo as Contract, Source as ConsPhse, csString030 as MarketSeg, csString060 as Special, Section as
Section, DaysRequested as PerfDays, dbo.f_DescribeCode('Source', dh.source, EE06ED1B-0329-4154-81A7-756C281EBD93') as
ConsPhseName FROM dbo.xsfDocHeader dh JOIN dbo.vsf_RevisionInfo vri on vri.DocMasterKey = dh.DocMasterKey JOIN
dbo.xsfDocRevision dr on dr.DocRevKey = vri.DocRevKey WHERE dh.Project = @pProject and dh.DocTypeKey = 'EE06ED1B-0329-
4154-81A7-756C281EBD93'
```

Below the text area, there is a table with the following data:

	Contract	ConsPhse	MarketSeg	Special	Section	PerfDays	ConsPhseName
▶		02	Health Care	None at this time	42z	180	Buy Out
*							

At the bottom of the window, it says "qProjInfo Completed - 1 rows in 12.0ms".



Thank You for Joining this Webinar

Mark your calendar for our Next Webinar

New Functionality

Cloud Drive Integration

Presented by: Stan York
VP of Spitfire Development

March 12th – 1:00 pm EST

Have a topic you'd like included in an upcoming Webinar?

Send your suggestion to dmcgovern@spitfiremanagement.com

