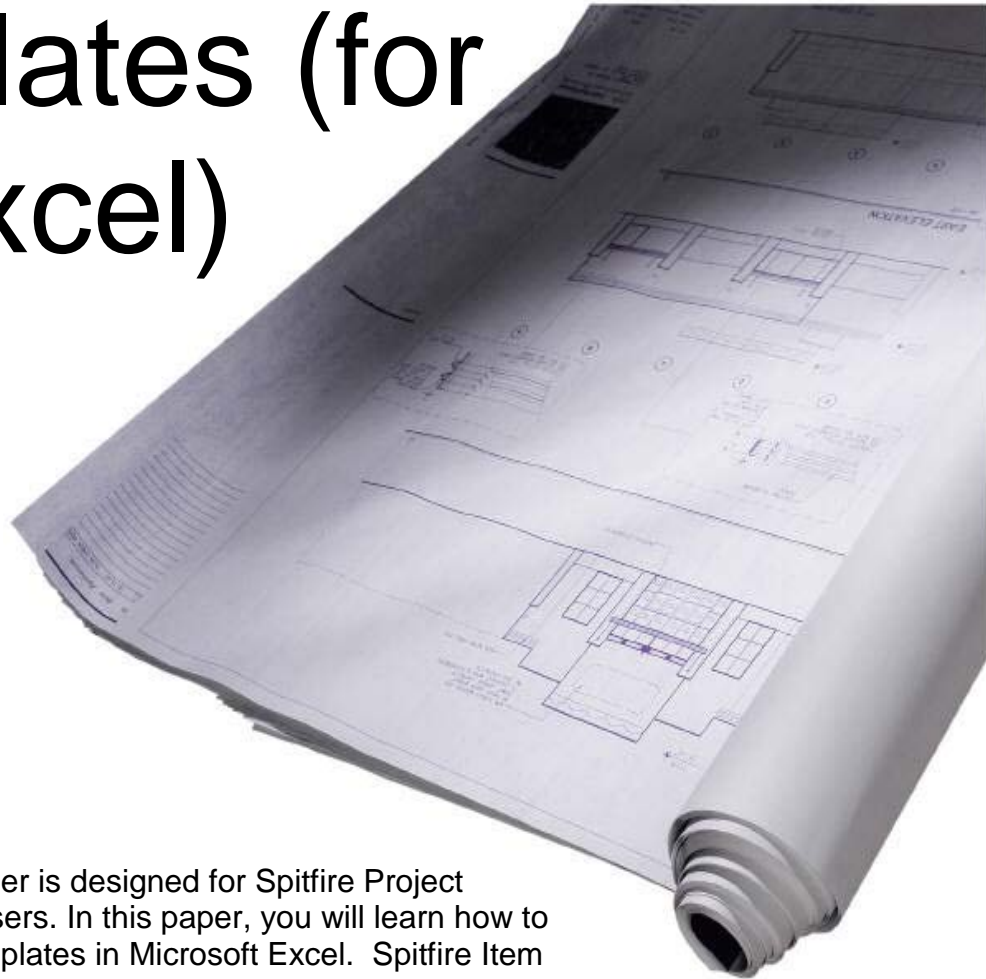


Spitfire Item Templates (for Via Excel)



This technical white paper is designed for Spitfire Project Management System users. In this paper, you will learn how to create Spitfire Item Templates in Microsoft Excel. Spitfire Item Templates are needed in order to use the Via Excel option when adding or editing document Items.

Revision Number: 4.5.12.03.2014

© Copyright 2008- 2014 Spitfire Management, LLC. All Rights Reserved.

No part of this document may be reproduced, stored in a retrieval system, or transmitted, in any form or by any means electronic or mechanical, photocopying, recording, or otherwise without written permission of Spitfire Management, LLC.

© 2005-2014 Microsoft, Microsoft Business Solutions (MBS), Microsoft Dynamics and Solomon are either registered trademarks or trademarks of Microsoft Corporation, Great Plains Software, Inc. or Microsoft Business Solutions Corporation in the United States and/or other countries. FRx are either trademarks or registered trademarks of FRx Software Corporation. Microsoft Business Solutions Corporation is a wholly-owned subsidiaries of Microsoft Corporation.

The names of actual companies and products mentioned herein may be the trademarks of their respective owners.

Spitfire Management, LLC.
7 Skyline Drive, Suite 350
Hawthorne, NY 10532
ph. 914.273.0809
fax: 914.273.4208

www.spitfiremanagement.com

Table of Contents

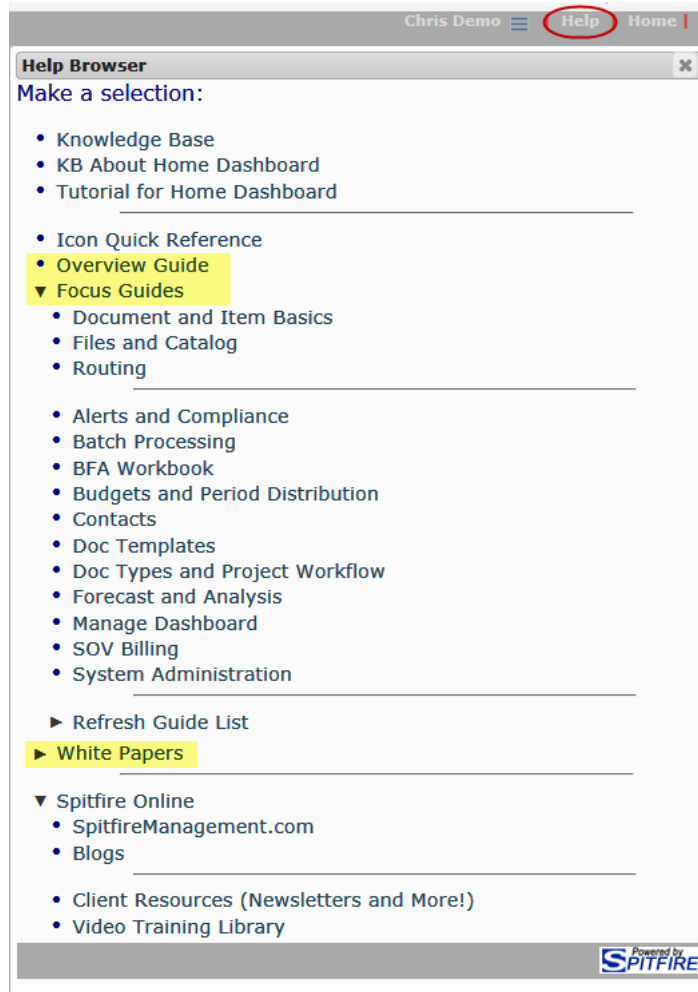
Introduction	4
Concepts.....	5
Planning	6
Use of Templates.....	6
Field Names.....	7
Basic Spitfire Item Template.....	9
Creating the Template	9
Modifying the Default Template	10
Changing the Order of Columns.....	11
Relabeling and Reformatting Columns.....	14
Hiding and Deleting Columns.....	16
Unhiding Columns	17
Deleting Rows	18
Unhiding and Hiding the RawAddr Sheet.....	18
Making Cosmetic Changes.....	19
Setting the Current Cell	20
Saving the Template.....	20
Closing the Template and Dialog Box	21
Advanced Columns for Spitfire Item Templates.....	22
To_Formula Column	22
New Formula Column.....	23
Existing Column as Formula Column	25
To_RowFlag Column	26
To_DeleteFlag Column.....	30
Removing Defined Names.....	33
Testing the Spitfire Item Template	34
Running a Quick Test	34
Warning Messages	36
Hidden Sheets	36
Unexpected Columns	37
Uploading the Spitfire Item Template	39
Using the Spitfire Item Template.....	41
Add Items to Document with No Items	42
Append Items to Document with Items.....	42
Edit Items	43
Export Items.....	44
Import Items.....	45
Field Names in Appropriate Doc Types.....	46
Bid.....	46
Bid Package.....	46
CCO	47
Commitment.....	47
Daily Field Report	48
Meeting Minutes	48
Pay Request	49
Project Setup	50
Punch List	50
RFQ	51
Submittal, Submittal Package and Submittal Item Register	52

Introduction

This technical white paper describes the creation of Spitfire Item Templates in Microsoft Excel. Spitfire Item Templates are needed in order to use the Via Excel option when adding or editing document Items. You are encouraged to review this entire white paper prior to beginning a practical exercise.

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

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

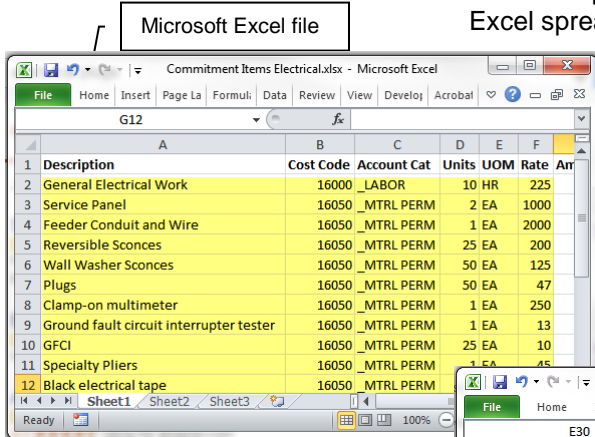


Note: This technical white paper also assumes you can open and use Microsoft Excel. Anyone without a basic understanding of Microsoft Excel should take the time to learn that application before attempting to create a Spitfire Item Template.

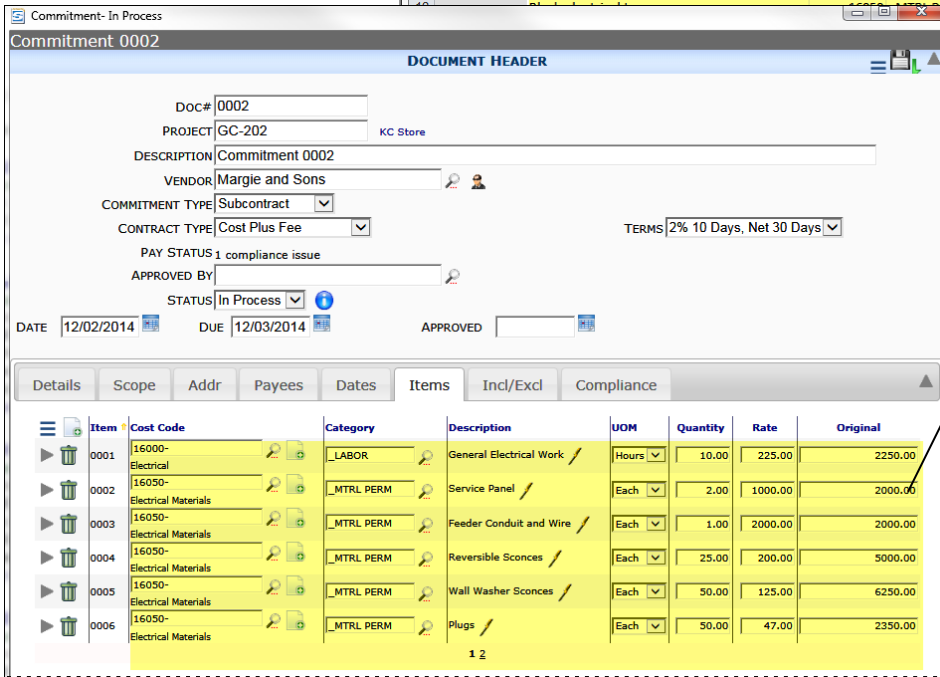
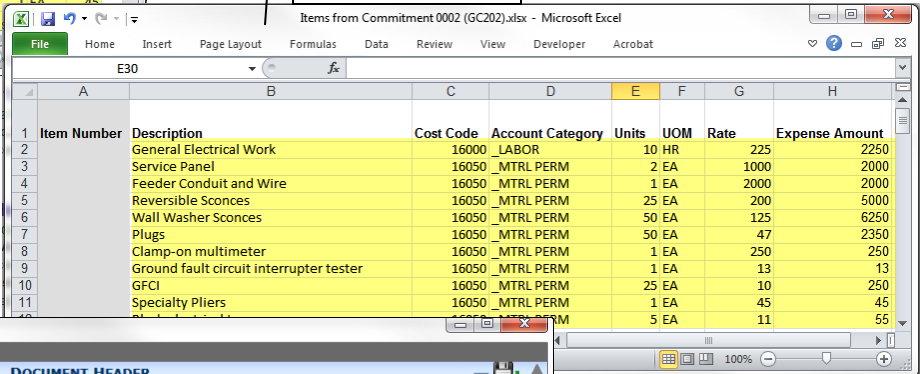
Note: Except for some updated pictures, this documentation is the same as that for V4.4.

Concepts

Most Spitfire documents include Items. You can choose to add Items to documents manually through the Add New icon (📄). However, you might prefer to add or edit information from a Microsoft Excel spreadsheet instead. You can copy Items from any Microsoft Excel spreadsheet to your Spitfire document through the Via Excel option found on the Item Options menu. Spitfire Item Templates facilitate this process by making the information on Microsoft Excel appear as you want it. You can also use templates when exporting item information from the Spitfire Project Management System (sfPMS) to a Microsoft Excel spreadsheet for output purposes.



Data copied to Spitfire Item Template to create Spitfire Item File.



Data added to Spitfire document.

Planning

Use of Templates

The number and exact configuration of Spitfire Item Templates (colloquially called “Via Excel templates”) for each of your desired Doc types depend on how you (or your users) will use these templates.

- If you want to add data from a Microsoft Excel file to a Spitfire document (as shown in the picture on the previous page), and/or to enter Items for a Spitfire document by typing them directly in a Microsoft Excel file, you will need to create a basic Spitfire Item Template for that Doc type. Spitfire Item Templates contain a **ToSpitfire** sheet. No special columns are required in the Spitfire Item Template, unless you want greater functionality as explained below.

Note: instructions on page 9 explain how [to create a Spitfire Item Template](#).

- If you want your Spitfire Item Template to include columns with formulas, you will need to either add one or more [To Formulan](#) columns to your template or name an existing column [To Formulan](#) (as described on page 22).
- If you want the template to indicate which static Item rows should be added (and which rows should not be added) to a document, you will need to include a [To RowFlag](#) column in your Spitfire Item Template (as described on page 26).
Note: you cannot have a To_RowFlag column in a template that will be used to *edit* Items.
- If you want to use Microsoft Excel to delete existing Spitfire document Items, you will need to include a [To DeleteFlag](#) column in the Spitfire Item Template (as described on page 30).

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

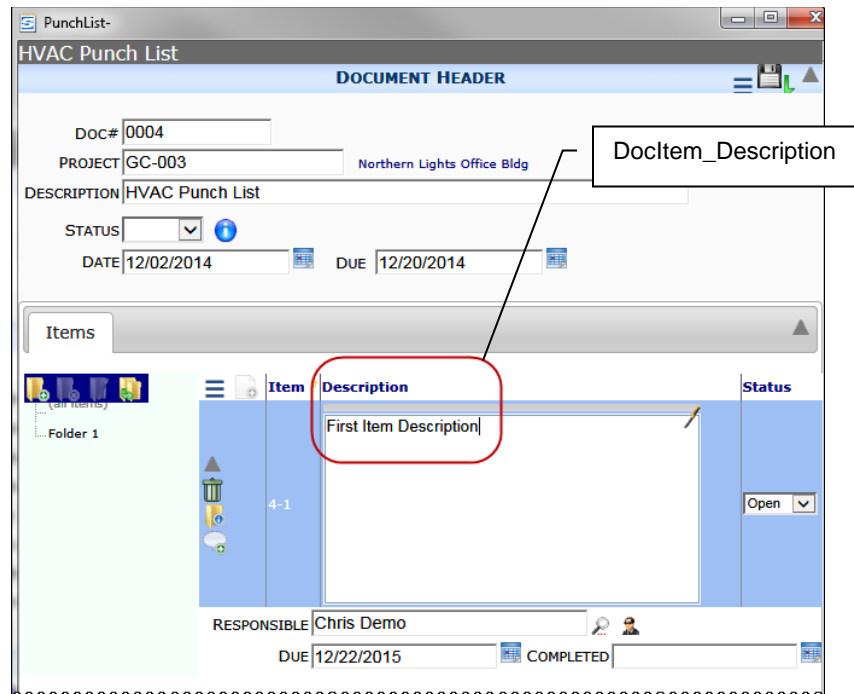
In general, you can create any number of Spitfire Item Templates for each desired Doc type as long as you give each template a distinct filename. Also, it is easier to create one basic template file for each Doc type and then modify that file (and **Save As**) if you need to create other similar templates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

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

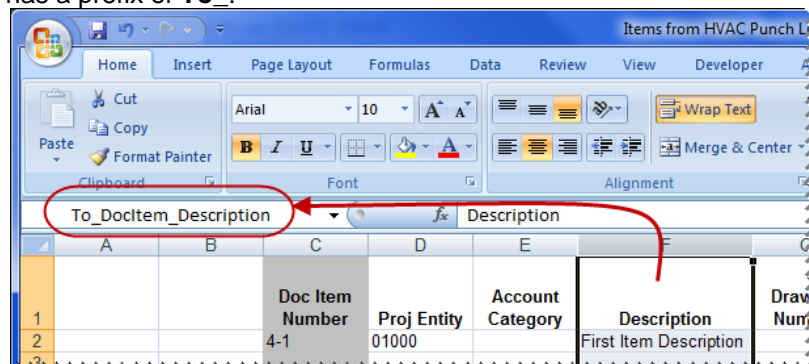
Field Names

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

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



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



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

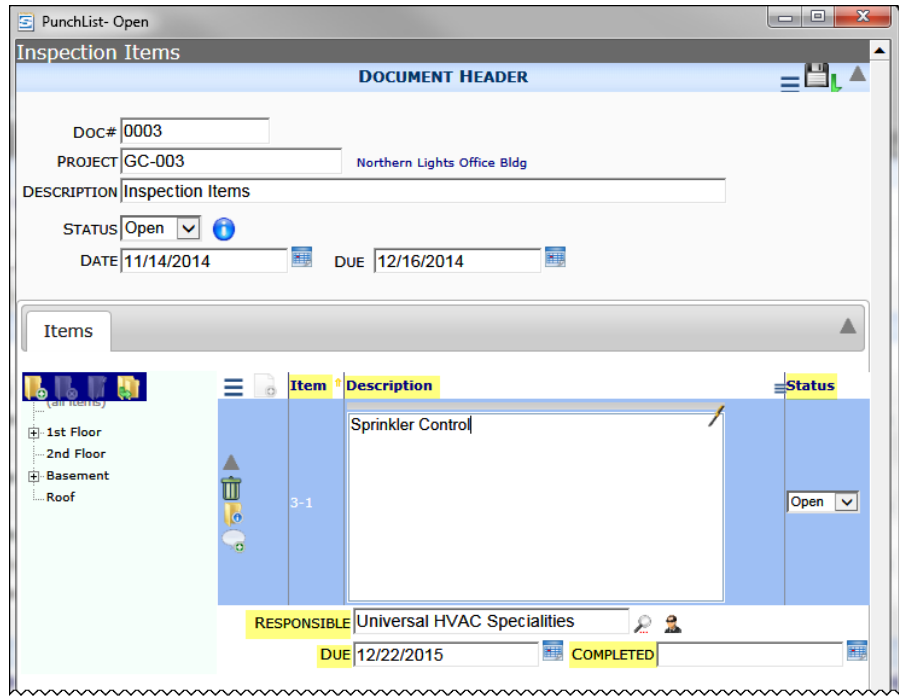
As preparation, you should write down the names of all the fields that you want in your Spitfire Item Template and the order in which you want them to appear.

You can find the [names of the fields](#) on common Doc types starting on page 46. These fieldnames are also those used in bookmarks (on bookmark templates) and what appear in the Customization tool, if you are more familiar with such means of determining fieldnames.

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

Tutorial

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




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

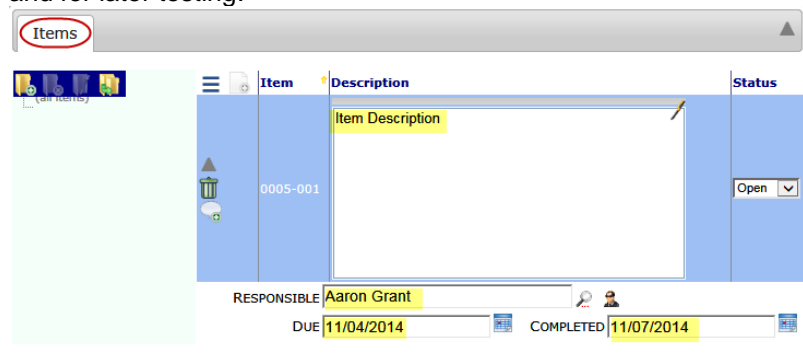
Basic Spitfire Item Template

Creating the Template




Tutorial

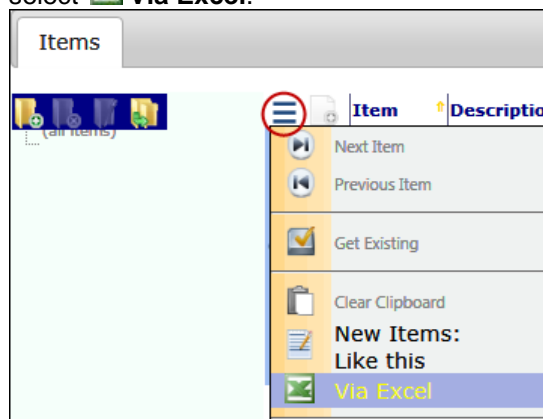
After planning, you are ready to create the Spitfire Item Template for your Doc type (PunchList in our example).

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



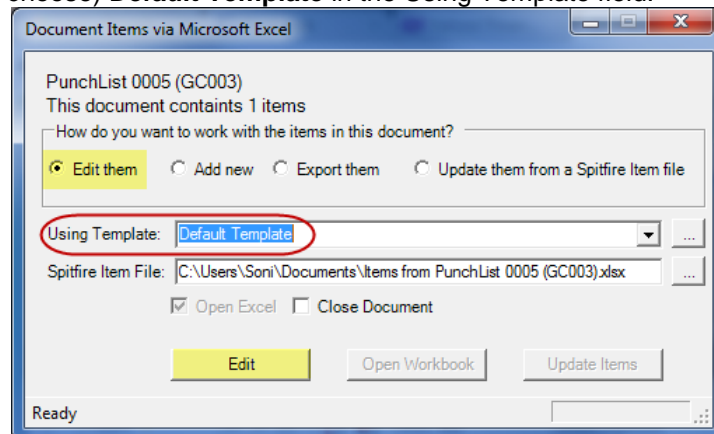
IMPORTANT: you should not add more than one Item to your document.

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

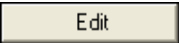


The Document Items via Microsoft Excel dialog box will appear.

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



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

- Click . The default Spitfire Item Template will open.
- Modify the template to suit the Doc type as described in the next section.

Modifying the Default Template

The default Spitfire Item Template contains many possible columns of information because it is the starting point for all Doc types:

	A	B	C	D	E	F	G	H	I	J
1			Doc Item Number	Proj Entity	Account Category	Description	Drawing Number	Item Quantity	Quantity	Expense Amount
2			0005-001			Item Description		0	0	\$0.00
3										
4										
5										
6										
7										
8										
9										
10										
11										
12										
13										
14										

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

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

- Change the order of the columns
- Re-label and reformat some columns
- Hide unused (labeled) columns
- Delete empty columns
- Delete the row that contains data
- Set the current cell for future users
- "Save As" the spreadsheet thus creating a separate Spitfire Item Template meant just for your desired Doc type. You should save the Spitfire Item Template as an **.xlsx** file (Microsoft Excel 2007 or 2010).

Note: while the instructions to save are given after other instructions, you can choose to save at any point. Just be sure to **Save As** the first time and then **Save** when you have finished modifying the worksheet.

Changing the Order of Columns

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

	A	B	C	D	E	F
1			Doc Item Number	Proj Entity	Account Category	Description
2			0004-001			First item de

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

Tutorial

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

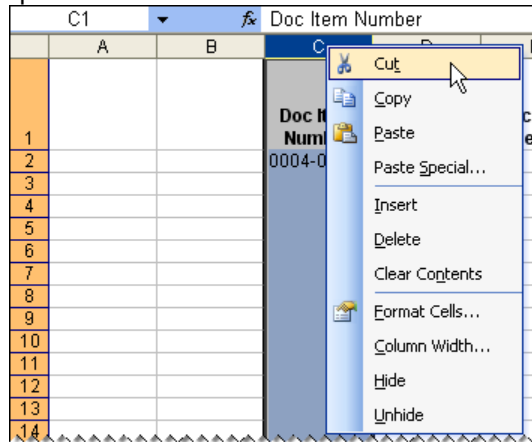
TIP

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

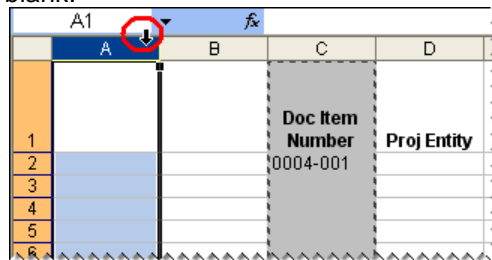
	A	B	C	D	E
1			Doc Item Number	Proj Entity	Account C
2			0005-001	01000	


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

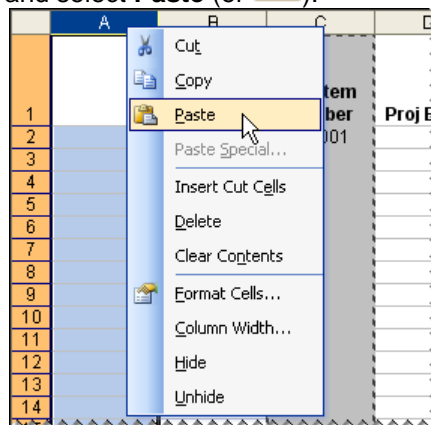
TIP
 You can also use the keyboard shortcuts **Ctrl + X** and **Ctrl + V** to cut and paste columns.



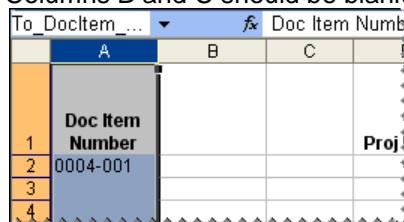
- Scroll over to the first column of the spreadsheet. It should be blank.



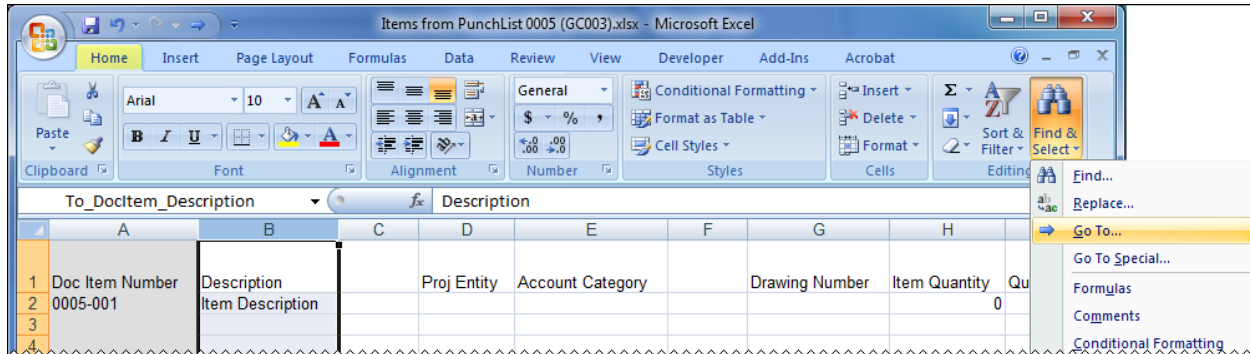
- Right-click on the column header (A) to open a drop-down menu and select **Paste** (or ).



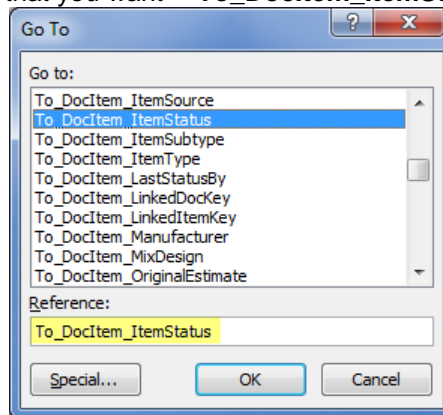
The column header and any data will appear in Column A. Columns B and C should be blank now.



6. Repeat steps 2-5 for your next column:
To_DocItem_Description. Paste **To_DocItem_Description** in Column B. Column C should still be blank.
7. Select **Go To...** from the **Find & Select** option on the Home ribbon:



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

**TIP**

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

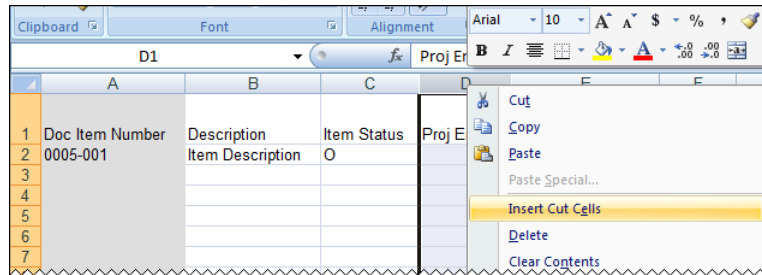
9. Click . The column will be highlighted and selected.
10. Cut and paste this column into Column C. Your spreadsheet should now look like the following:

	To_DocItem_ItemStatus		Item Status		
	A	B	C	D	E
1	Doc Item Number	Description	Item Status	Proj Entity	Account
2	0005-001	Item Description	O		
3					

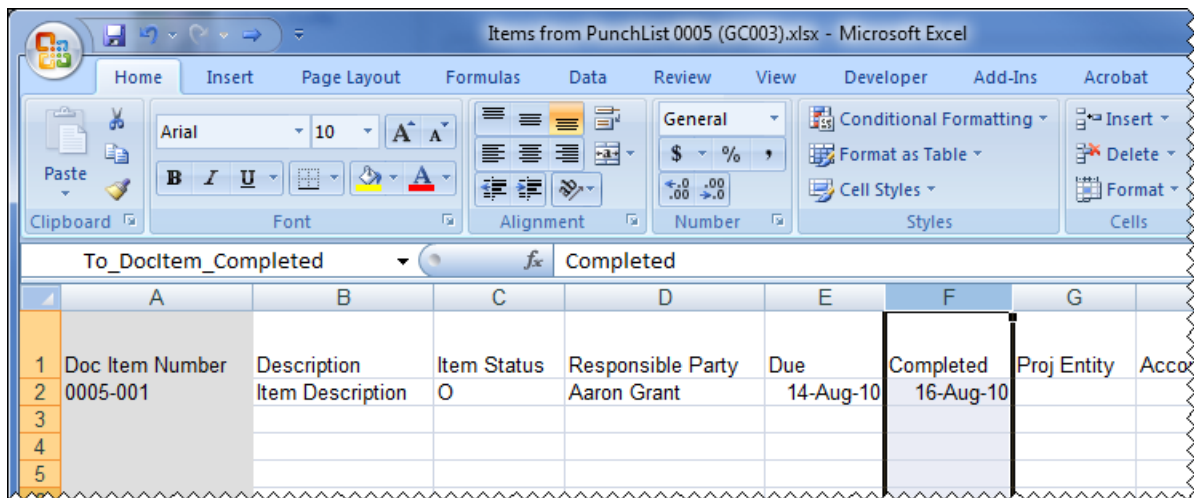
TIP

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

11. Using the **Go To** option, find your next column— **To_DocItem_ResponsibleParty_dv**—and cut it.
12. Place the cursor on the column where you want to position the Responsible Party column (in this case, column D), then right-click and select **Insert Cut Cells**.



13. Using the Go To feature if necessary, find your next column—**To_DocItem_Due**—cut it, then insert cut cells in Column E.
14. Repeat the process for **To_DocItem_Completed**. Your spreadsheet should look like the following:

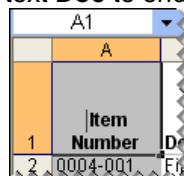


Relabeling and Reformatting Columns

Tutorial

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

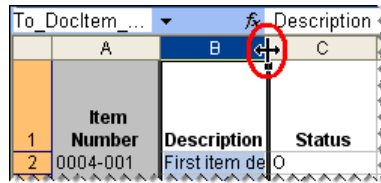
1. Double-click in cell A1, which currently says **Doc Item Number**.
2. Change the heading text, if you want. For example, delete the text **Doc** to end up with just **Item Number**.



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

TIP

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



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

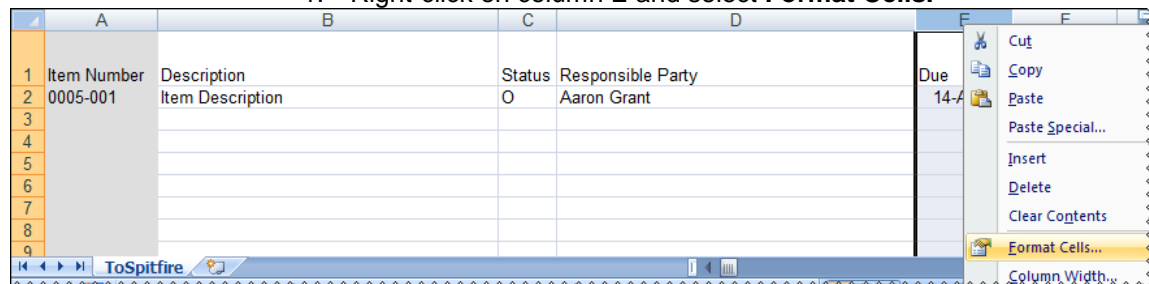
- Since the **Item Status** column will hold only a short code, you can delete the text **Item** and make that column narrower.

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

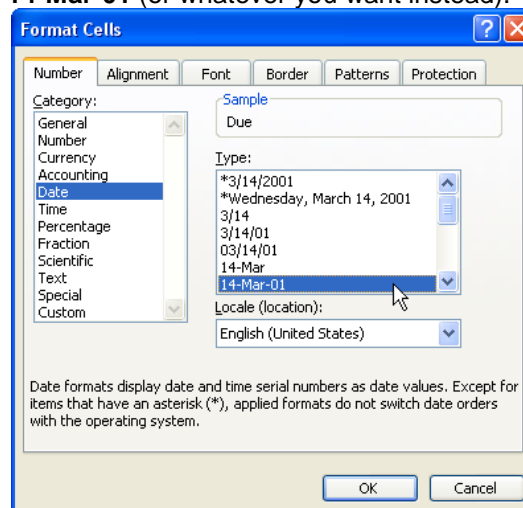
	A	B	C	D	E	F
1	Item Number	Description	Status	Responsible Party	Due	Completed
2	0005-001	Item Description	O	Aaron Grant	14-Aug-10	16-Aug-10
3						

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

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



- On the Format Cells dialog box (Number tab), select **Date** then **14-Mar-01** (or whatever you want instead).



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

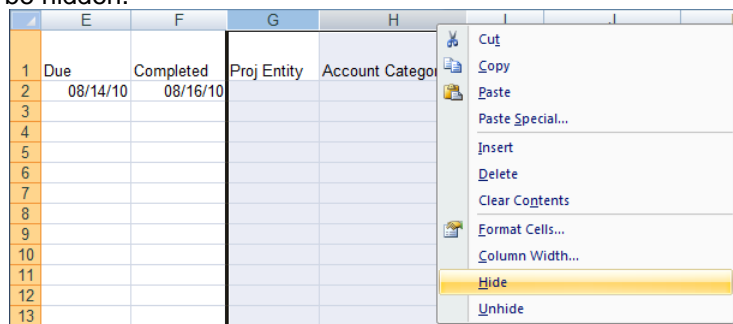
- Do the same thing for the **Completed** column.
Note: you can also format numeric fields in the same manner.

Hiding and Deleting Columns

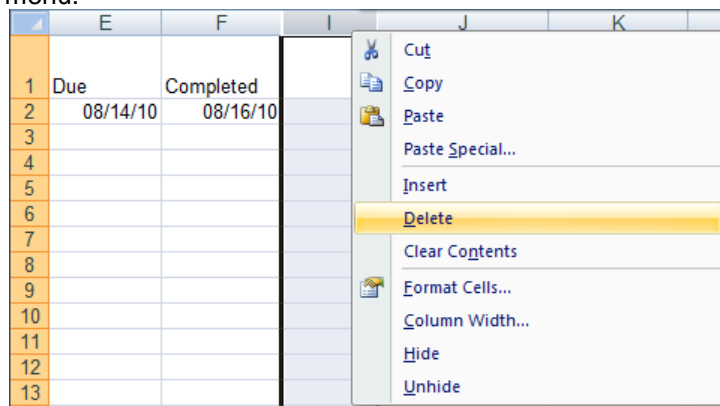
Once you have changed the columns for your template, you should remove from view the other columns on the worksheet. Those other columns will not be visible in the Spitfire Item template for this particular Doc type. Columns with headers need to be hidden; empty columns need to be deleted.

Tutorial

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



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

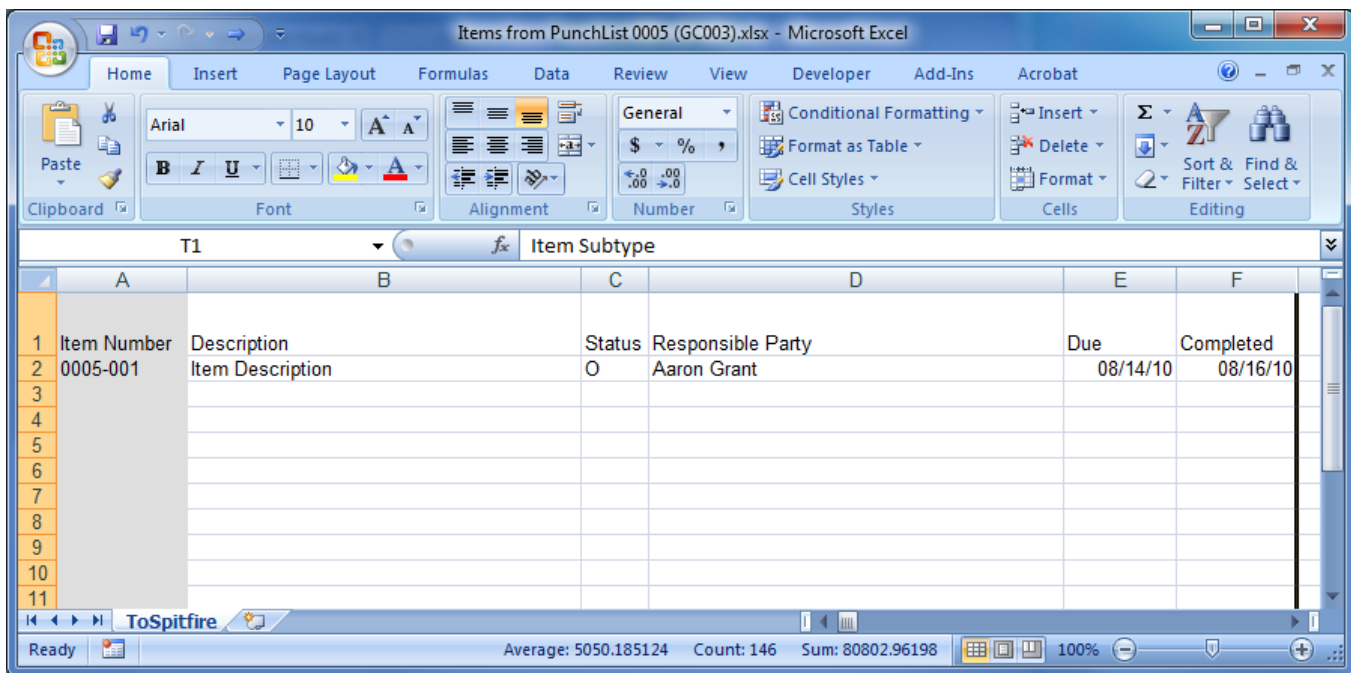


- Continue the process, moving from column to column to the right, hiding columns with headings and deleting columns that are empty. You can stop when all columns with headings have been hidden.

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

TIP

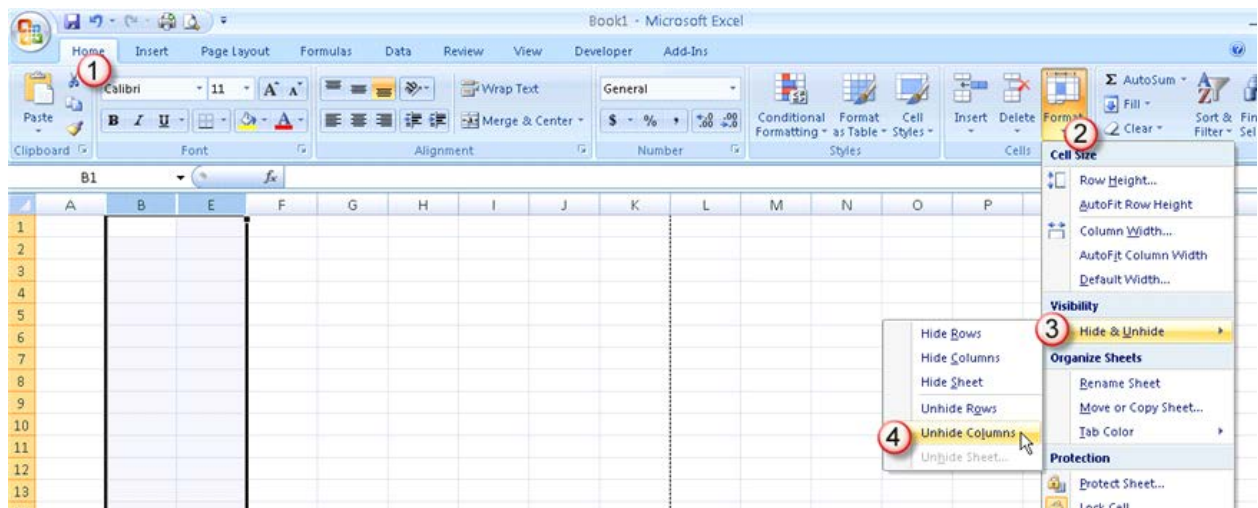
You must hide columns with headers if you don't want them to appear in your template. If you delete them, they will "come back" when the template is next opened. Hidden columns stay hidden.



Unhiding Columns

To unhide columns in Microsoft Excel 2007 and 2010,

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



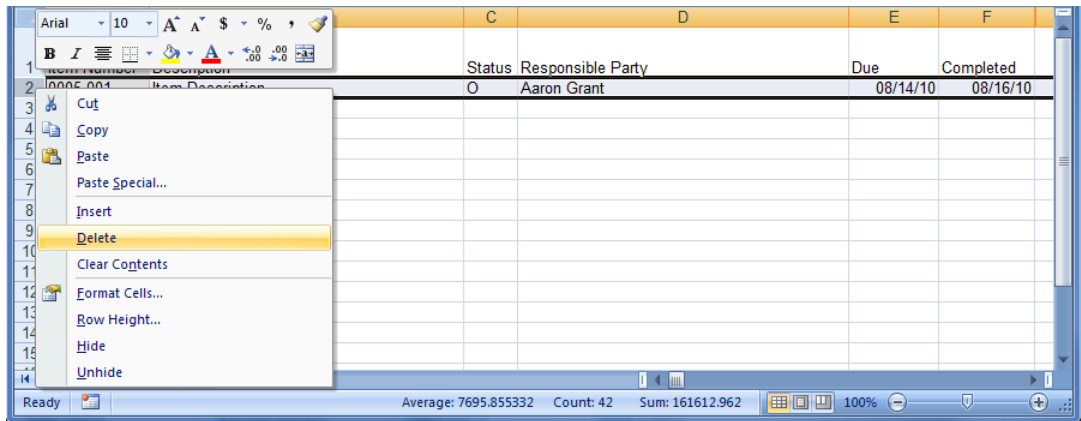
All hidden columns in that area will reappear.

Deleting Rows

Since you are creating a template, you now need to remove any data that is in your spreadsheet.

Tutorial

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

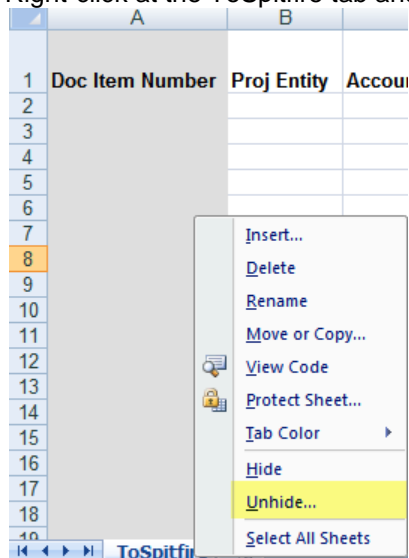


Unhiding and Hiding the RawAddr Sheet

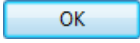
Some Doc types automatically supply address data to the template. Since your template must not have any data on it, you may need to check the RawAddr sheet and delete any rows of data found there. The RawAddr sheet is normally hidden.

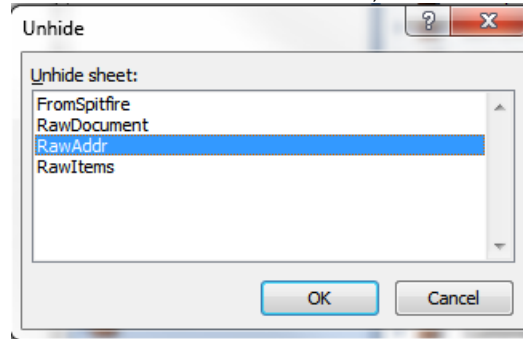
Tutorial

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



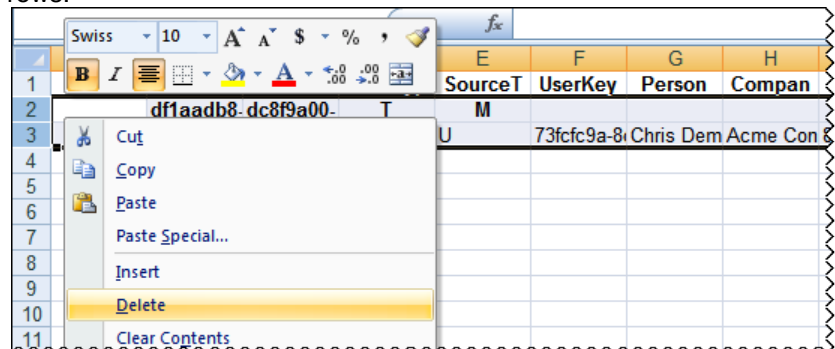
A box listing all hidden worksheets will appear.

2. Select the RawAddr worksheet, then click 

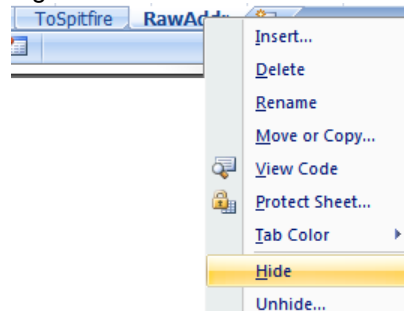


The hidden worksheet will become visible.

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



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



Making Cosmetic Changes

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

Setting the Current Cell

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

Tutorial

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

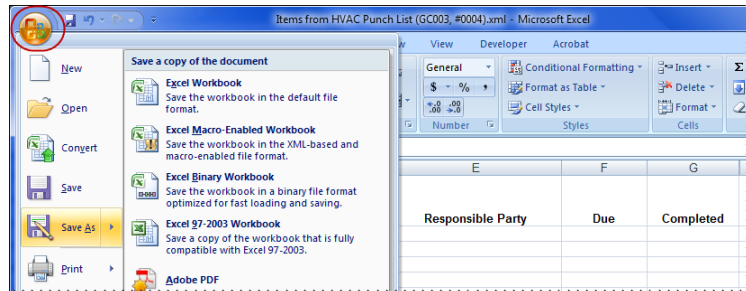
	A	B	C	D	E	F
1	Item Number	Description	Status	Responsible Party	Due	Completed
2						
3						
4						
5						
6						
7						

Saving the Template

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

Tutorial

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





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

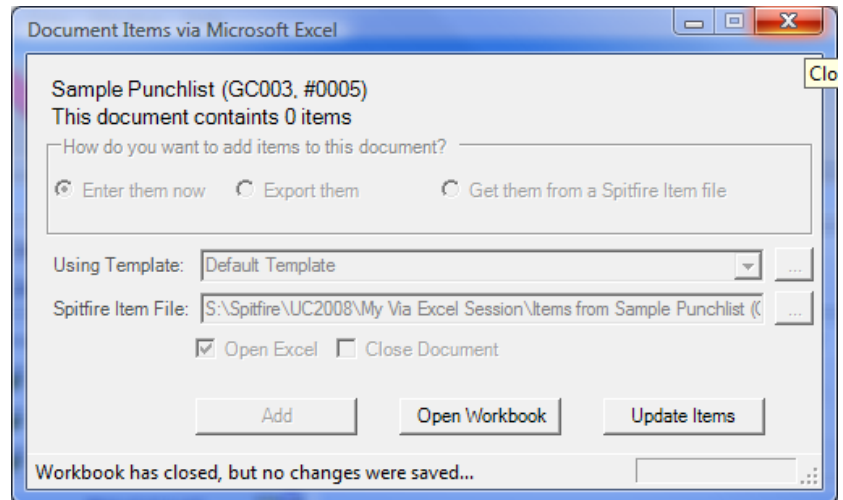
Note: if you save the file again, you can use the **Save** option.

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

Closing the Template and Dialog Box

Tutorial

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



The Spitfire Item template is now ready [to be tested](#), as described on page 34 or [to be uploaded](#), as described on page 39.

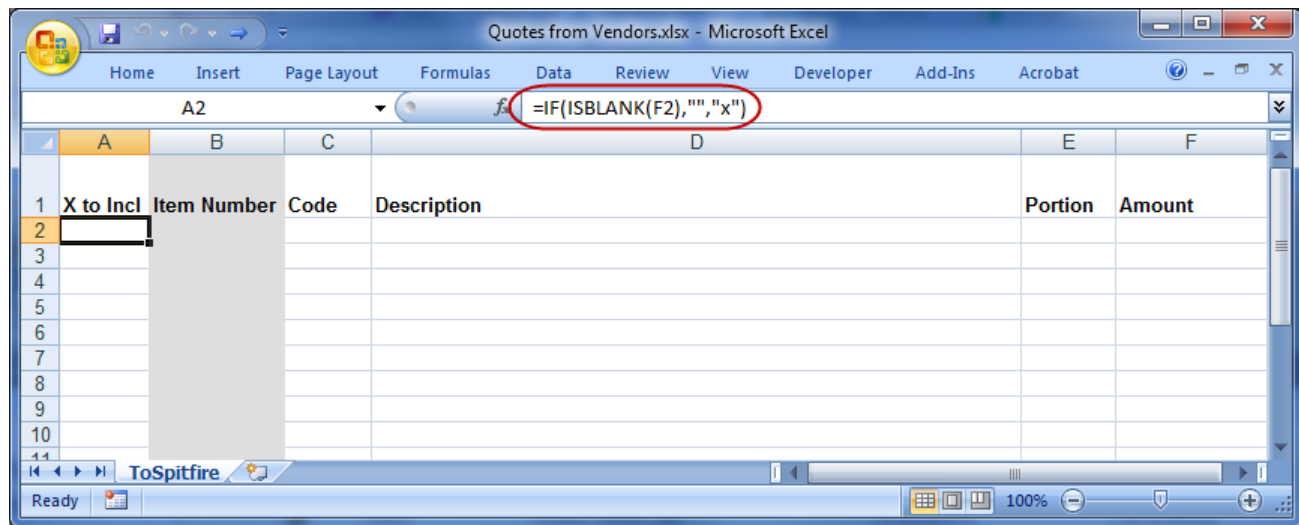
Advanced Columns for Spitfire Item Templates

To_Formula Column

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

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

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



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

The screenshot shows the Microsoft Excel interface with the following data in the spreadsheet:

	A	B	C	D	E	F	G	H	I	J	K
1	Item Number	Description	Cost Code	Contract Amount	Prior	Remaining	Qty	Current	% Complete	Retention	Net Expense
2	0001	Paving & Surfacing	02500	\$20,000.00	\$10,000.00	10000	\$0.00	\$5,000.00	\$75.00	\$500.00	\$4,500.00
3	0002	Curbing	02500	\$1,293.75	\$645.00	648.75	\$44.44	\$100.00	\$57.58	\$10.00	\$90.00
4	0003	Drainage	02500	\$5,250.00	\$2,625.00	2625	\$0.17	\$125.00	\$52.43	\$12.50	\$112.50
5	0004	Striping	02500	\$1,875.00	\$187.50	1687.5	\$10.00	\$50.00	\$12.67	\$5.00	\$45.00
6											
7											
8											
9											
10											

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

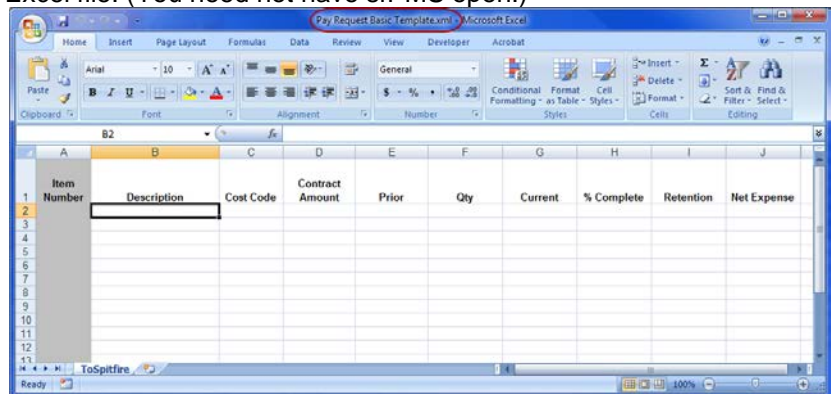
New Formula Column

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

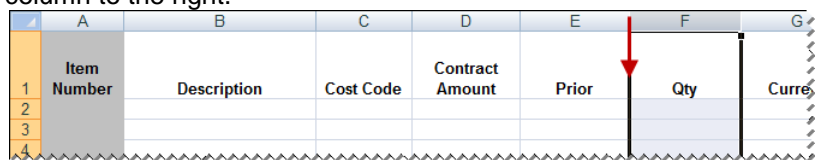
Note: once you get comfortable creating Spitfire Item Templates, you will find that you can create advanced templates without creating basic templates first.

Tutorial

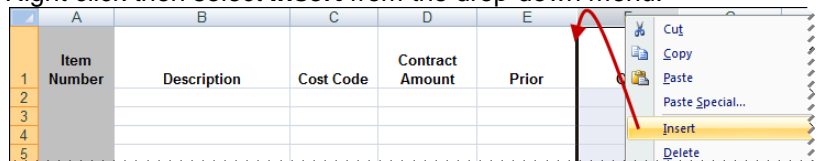
1. Open your Spitfire Item Template as you would any Microsoft Excel file. (You need not have sfPMS open.)



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

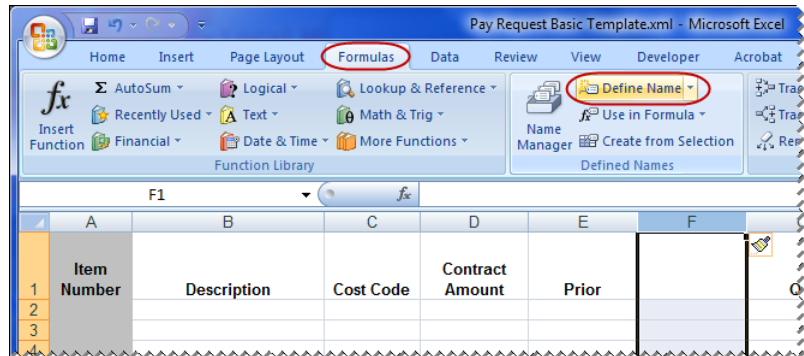


3. Right click then select **Insert** from the drop-down menu:

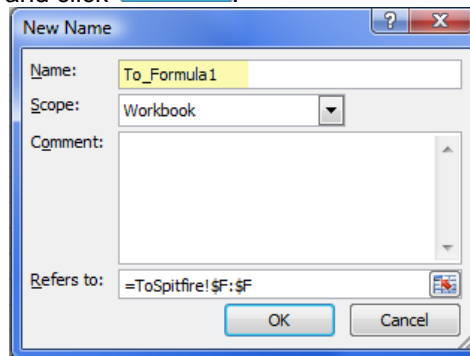


The new column will appear highlighted. This column will hold your formula.

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



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



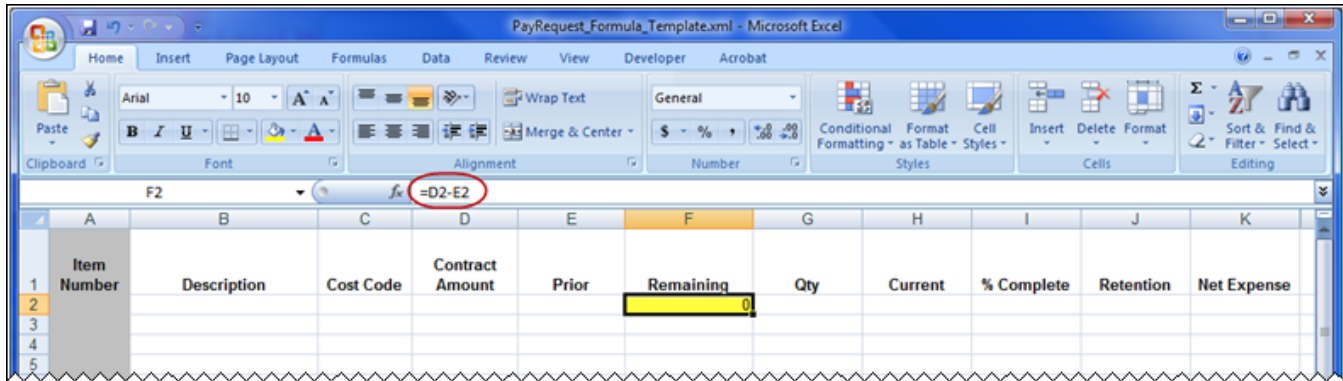
6. In Row 1 of this column, type a header, for example **Remaining**.
7. (optional) Widen the column, if necessary.
8. In Row 2 of this column, type your Microsoft Excel formula, for example, **=D2-E2**.

	A	B	C	D	E	F
1	Item Number	Description	Cost Code	Contract Amount	Prior	Remaining
2						=D2-E2
3						

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

9. Click on the column letter to select the whole column, then right-click and select **Format Cells** from the pop-up window.
10. Format the column as desired.
11. (optional) Repeat steps 1-8 if you want to add other formula columns. The second formula column must be named **To_Formula2**, the third **To_Formula3**, etc.
12. Remember to delete rows of data, if any appear in the template.
13. Choose to either **Save** or **Save As** depending on whether you want both the basic and advanced Spitfire Item templates or if you want just this one template file. Remember to save as an **.xlsx** file.

A modified Spitfire Item Template for Pay Request documents might look like the following:

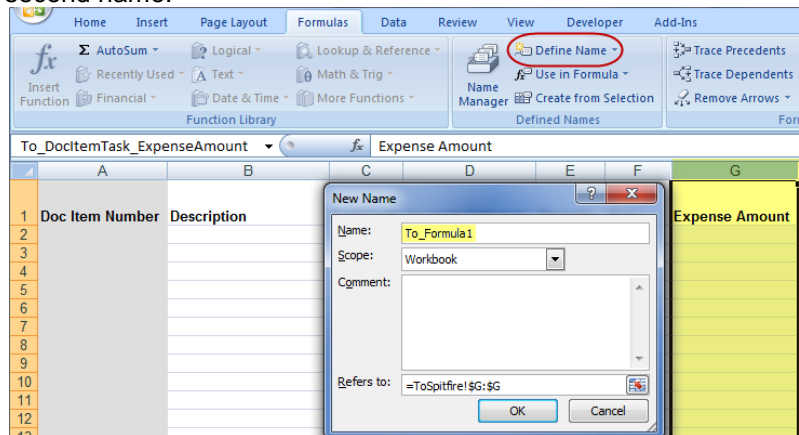


Existing Column as Formula Column

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

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

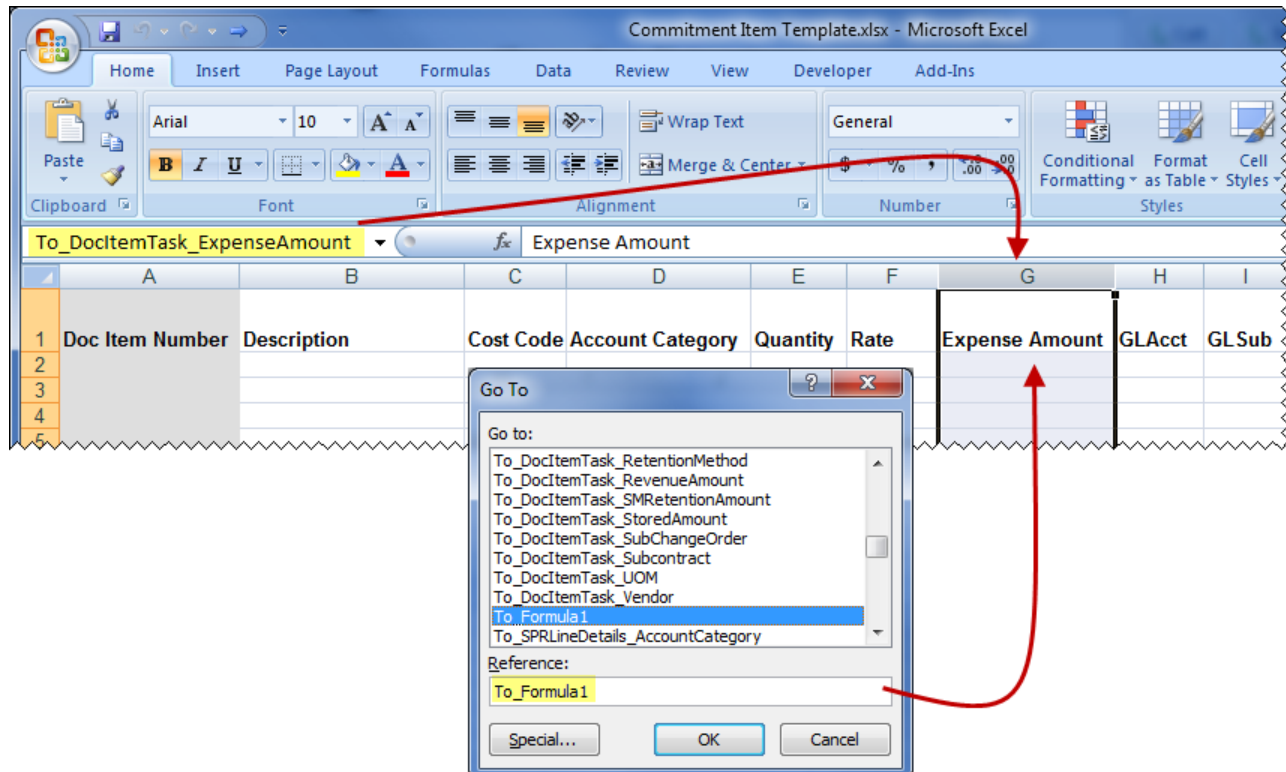
- Instead of inserting a blank column, find the column that should have a formula and define its name as **To_Formula n** . Since this column will already have a name, you will be giving the column a second name.



TIP

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

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



To_RowFlag Column

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

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

The screenshot displays a Microsoft Excel spreadsheet titled "Items from Sample Punchlist (GC003, #0005).xml". The spreadsheet has columns labeled "Include?", "Item Number", "Description", and "Cost Code". Rows 2 through 15 contain data for various construction items. An inset window titled "PunchList- PunchList 0005" shows a "DOCUMENT HEADER" with an "Items" table. The table in the inset window lists items with IDs (0005-001 to 0005-008), descriptions, and a "Status" column set to "Open".

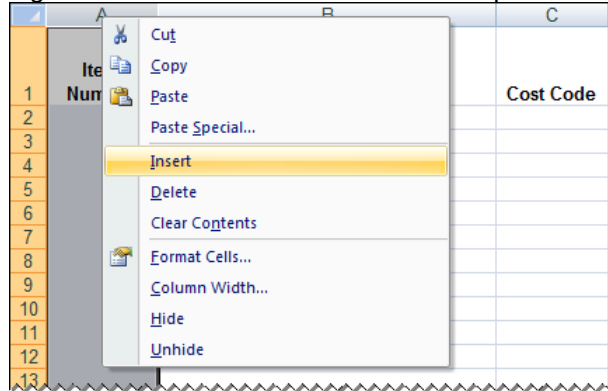
Item	Description	Status
0005-001	All concrete forms have been removed ... /	Open
0005-002	Grade slopes away from house 6 in vertic... /	Open
0005-003	All wood products removed from soil arou... /	Open
0005-004	Loose concrete cleaned up and hauled off /	Open
0005-005	Gas and electrical meters are connected /	Open
0005-006	All penetrations through walls caulked a... /	Open
0005-007	Shingles correctly nailed /	Open
0005-008	Roof flashings properly installed /	Open

Notes

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

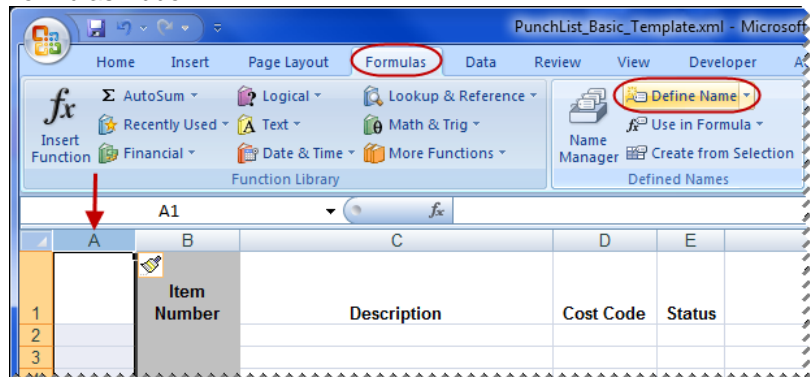
Tutorial

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

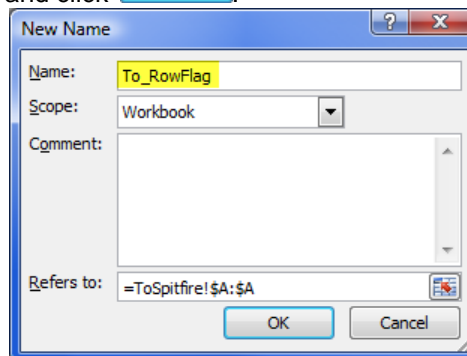


The new Column A will appear highlighted.

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



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



6. Click in cell A-1 and type a header for your column, for example, **Include Row?**
7. (optional) If you don't want all the columns from the basic template in this template, hide the unwanted columns.

8. In the data rows, type what you want to appear in this Spitfire Item Template. Users will be able to include these rows (as well as rows they add) by entering something (for example, an X) in the To_RowFlag column.
9. Choose to either **Save** or **Save As**, depending on whether you want both the basic and advanced Spitfire Item Templates or if you want just this one template. Save the template as an .xlsx file.

Your modified Spitfire Item Template for Punch List documents might look like the following:

	A	B	C	D	DY
1	Include?	Item Number	Description	Cost Code	
2			All concrete forms have been removed	01700	
3			Grade slopes away from house 6 in vertically for every 10 ft horizontally	02200	
4			Final grade smooth and back fill settled	02200	
5			All wood products removed from soil around house	01700	
6			Loose concrete cleaned up and hauled off	01700	
7			Hose bibs work	01700	
8			Brick and other wall surfaces cleaned	01700	
9			Gas and electrical meters are connected and sealed	07000	
10			All penetrations through walls caulked and sealed	07000	
11			Gutters and downspouts properly installed	01700	
12			All exterior trim properly installed	01700	
13			Shingles correctly nailed	02000	
14			Roof flashings properly installed	02000	
15			Roof vent collars caulked or sealed	02000	
16			All soffits correctly vented and installed	02000	
17			Windows securely installed, operate correctly and caulked	08000	
18			Screens installed	08000	
19			Siding properly nailed without bulges	06000	
20			Trim properly nailed and caulked	06000	
21			Deck properly installed and nailed	02000	

To_DeleteFlag Column

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

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

Items in Spitfire document

Spitfire Item file created from template. Some rows are marked for deletion.

	A	B	C	D	E	F	G	DY
	Delete Row?	Item Number	Description	Status	Responsible Party	Due	Completed	SOVLI Numb
1								
2		0001-001	Pre-construction Meeting	O				
3		0001-002	Emergency Phone # List	O				
4	x	0001-003	Job site location and map	O				
5	x	0001-004	Interior Inspection - Pictures	O				
6	x	0001-005	Emergency Procedures She	O				
7	x	0001-006	FPL Rebate Applications	O				
8	x	0001-007	Scan and File Signed Contra	O				
9		0001-008	Submittals	O				
10		0001-009	Asbestos Paperwork	O				
11		0001-010	MSDS Sheets (English and S	O				
12	x	0001-011	Permit Applications	O				
13	x	0001-012	Prepare Job Cost Sheets	O				
14	x	0001-013	Manufacturere's Warranty Ap	O				
15		0001-014	Order Materials	O				
16	x	0001-015	Equipment Ordered	O				
17		0001-016	Enter Initial Budget	O				
18		0001-017	Subcontract Buy Outs	O				
19		0001-018	Pre-StartUp Project Review	O				
20		0001-019	Notice of Commencement	O				
21		0001-020	Notice to Owner	O				

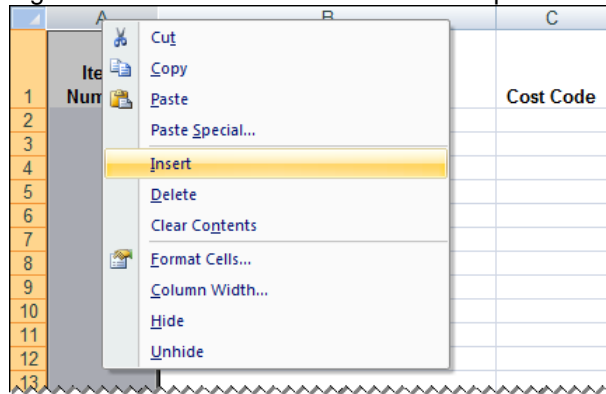
Item	Description	Status
0001-001	Pre-construction Meeting /	Open
0001-002	Emergency Phone # List /	Open
0001-008	Submittals /	Open
0001-009	Asbestos Paperwork /	Open
0001-010	MSDS Sheets (English and Spanish) /	Open
0001-013	Manufacturere's Warranty Application /	Open
0001-014	Order Materials /	Open
0001-016	Enter Initial Budget /	Open
0001-017	Subcontract Buy Outs /	Open
0001-018	Pre-StartUp Project Review /	Open
0001-019	Notice of Commencement /	Open
0001-020	Notice to Owner /	Open

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

You would open (or begin with) your basic Spitfire Item Template.

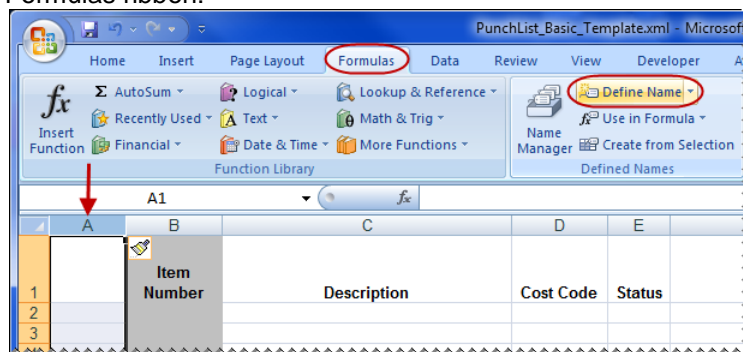
Tutorial

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

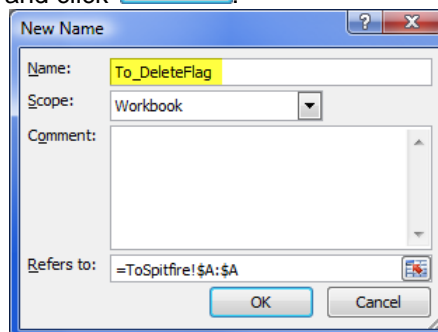


The new Column A will appear highlighted.

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

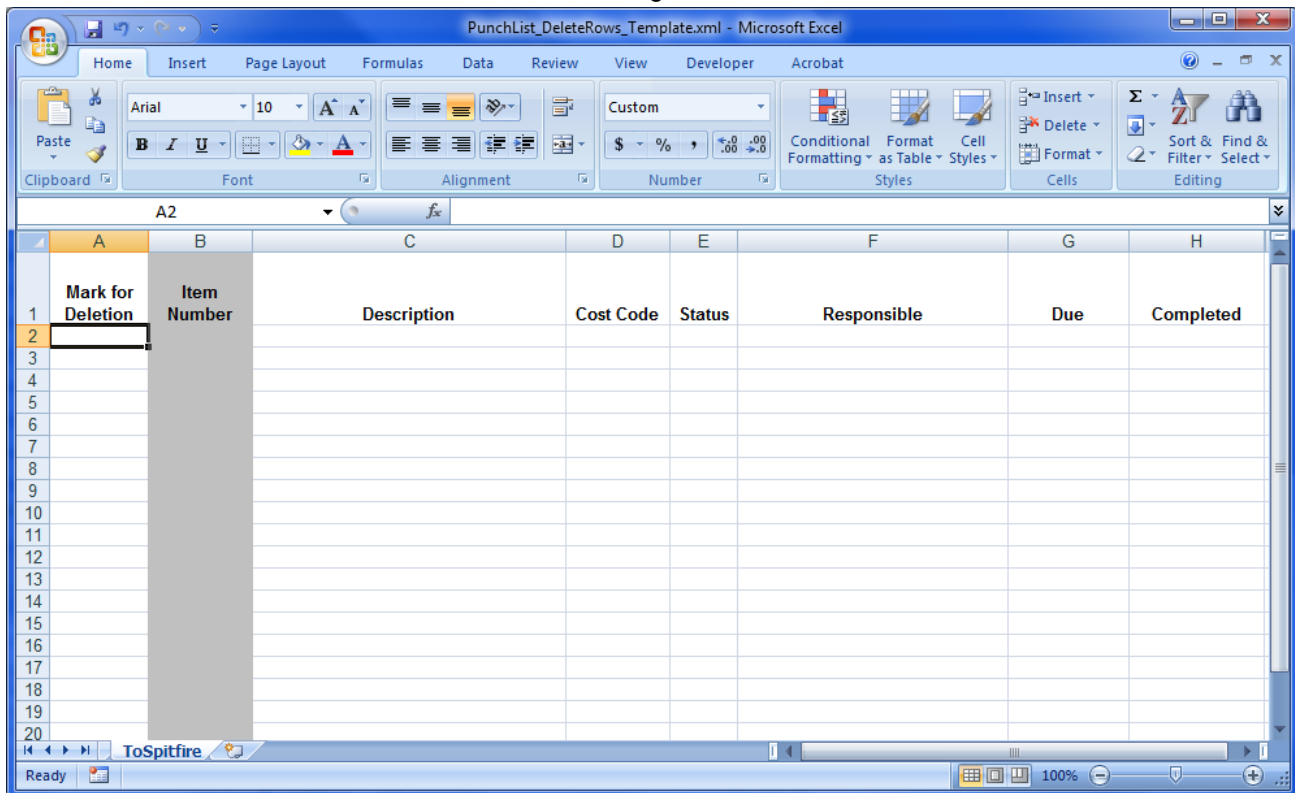


5. In the New Name dialog box that appears, type **To_DeleteFlag** and click **OK**:



- Click in cell A1 and type a header for your column, for example, **Mark for Deletion**.
- Choose to either **Save** or **Save As** depending on whether you want both the basic and advanced Spitfire Item Templates or if you want just this one template file. Remember to save as an .xlsx file.

Your modified Spitfire Item Template for Punch List documents might look like the following:



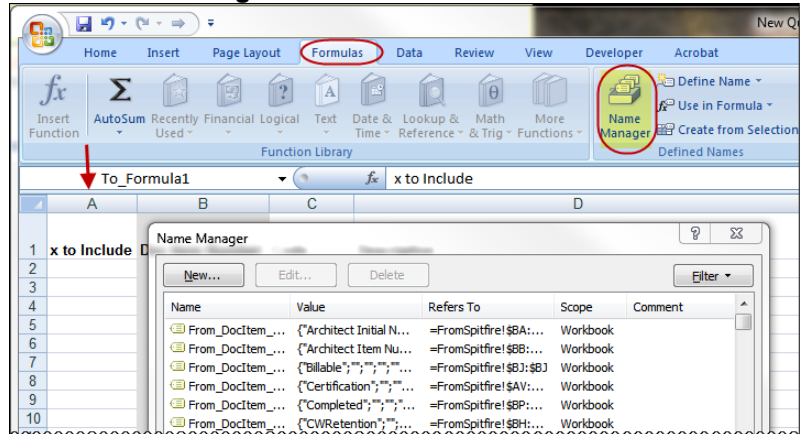
	A	B	C	D	E	F	G	H
1	Mark for Deletion	Item Number	Description	Cost Code	Status	Responsible	Due	Completed
2								
3								
4								
5								
6								
7								
8								
9								
10								
11								
12								
13								
14								
15								
16								
17								
18								
19								
20								

Removing Defined Names

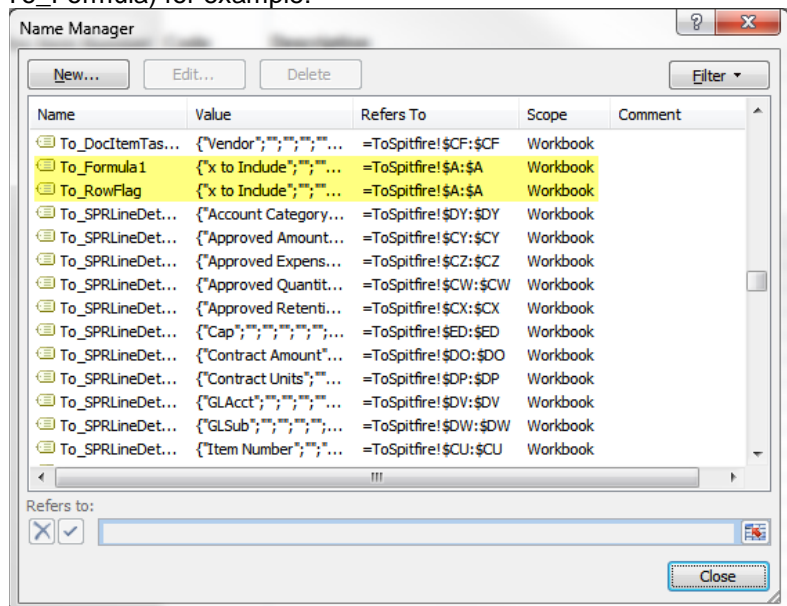
There may be times when you want to modify a template and remove the **To_DeleteFlag**, **To_RowFlag**, and/or **To_Formula** defined name.

To remove a defined name:

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



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






4. Select the defined name row(s) then click **Delete**.
5. Close the Name Manager window.

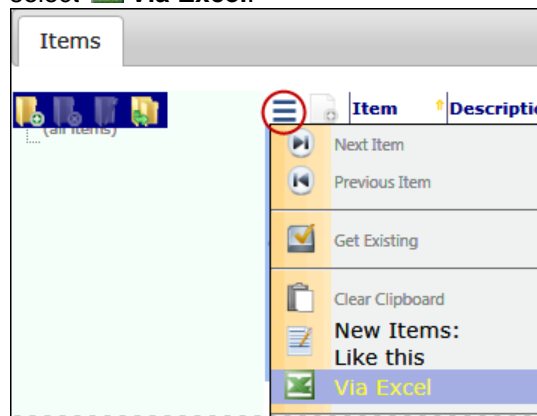
Testing the Spitfire Item Template

Before uploading a Spitfire Item Template into sfPMS, you might want to do a quick test to ensure that it looks and works as necessary.


Running a Quick Test

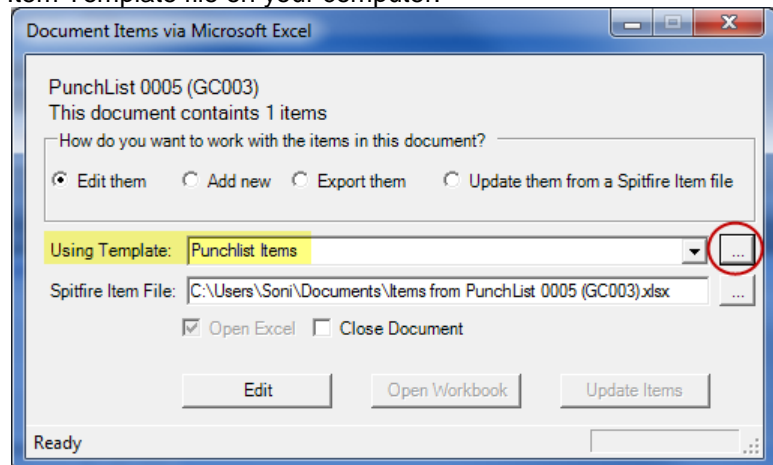
Tutorial

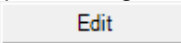
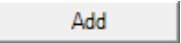
1. Open or create a document of the appropriate Doc type.
Note: if you are testing a template for editing, make sure there are Items on your document.
2. Click  to save your document.
3. At the Items tab, click  to open the Item Options menu then select  **Via Excel**.

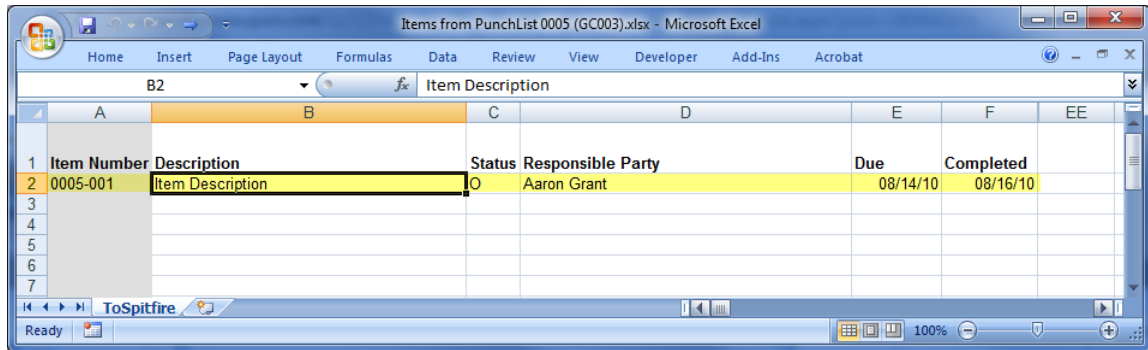


The **Document Items via Microsoft Excel** dialog box will appear.

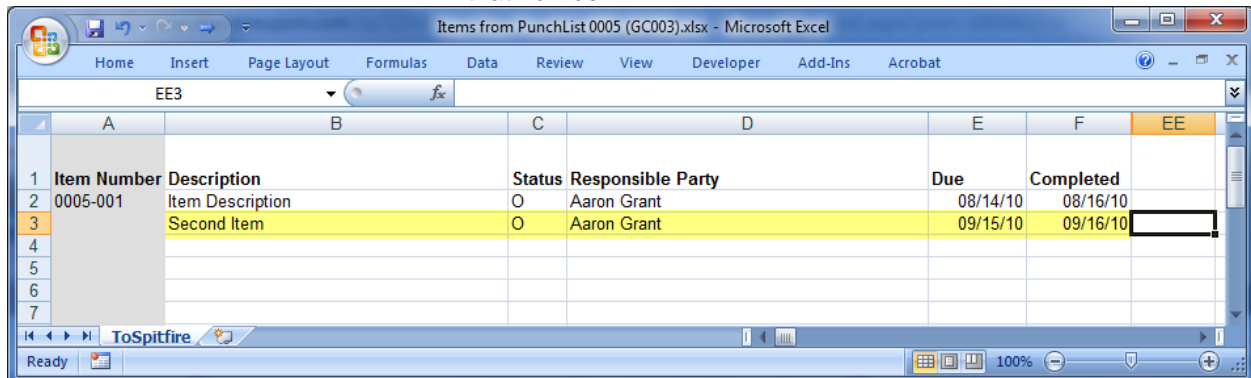
4. Click  at the Using Template field to browse for your Spitfire Item Template file on your computer.



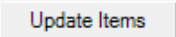


5. Depending on the type of template being tested and if there are Items on the document, click  or  to generate a Spitfire Item File from the Spitfire Item Template.
Note: see the [Warning Messages section](#) on page 36 if all does not work properly.

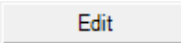
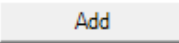


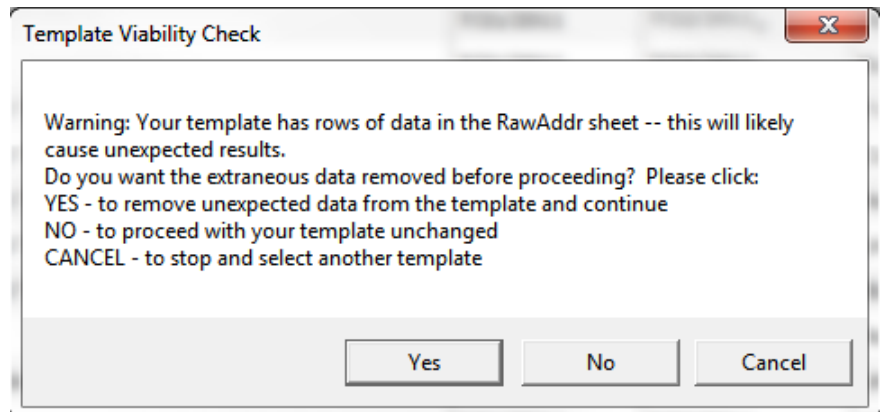
6. Ensure that any document Item data appears in the correct columns.
7. Type new data for all the available columns.
Note: leave the Item Number column blank; Spitfire will provide that number.



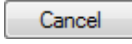
8. Click  to save then  to close Microsoft Excel. Your data will be uploaded to sfPMS.
Note: if data is not automatically uploaded to sfPMS, click the  button that appears on the **Document Items via Microsoft Excel** dialog box.
9. When your document reopens, expand Items to ensure that all information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

Warning Messages

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



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

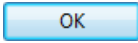
- Click  and close the Via Excel dialog box. In order to prevent each user from having to deal with this message, you should
 - Modify the template (outside of Spitfire) by [removing the extraneous data](#) (see page 18).
 - Save the revised template.

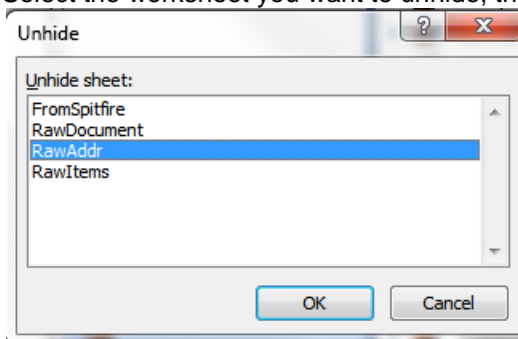
Hidden Sheets

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

To unhide template worksheets:

1. Right-click at the ToSpitfire tab and select **Unhide**:
A box listing all hidden worksheets will appear.

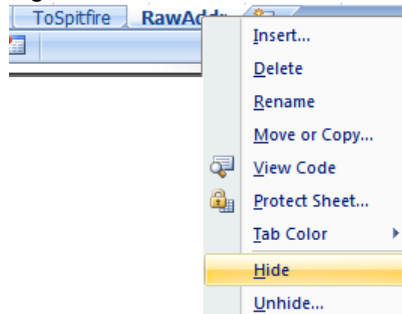
2. Select the worksheet you want to unhide, then click 



The hidden worksheet will become visible.

To re-hide template worksheets:



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




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

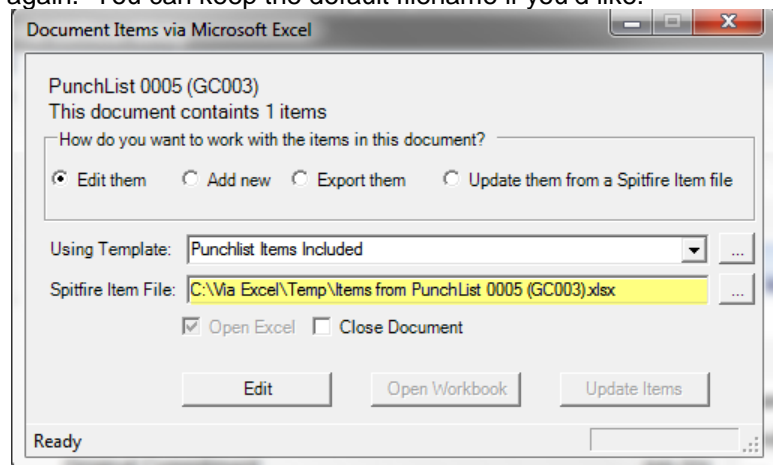
Unexpected Columns

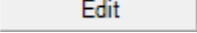
If your Spitfire Item File opens without a problem, but you notice a column that shouldn't be there, you will need to modify your template. But you may also need to open the Spitfire Item File. If you do not know where Spitfire places the Spitfire Item File, start your test of Via Excel again as follows.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


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

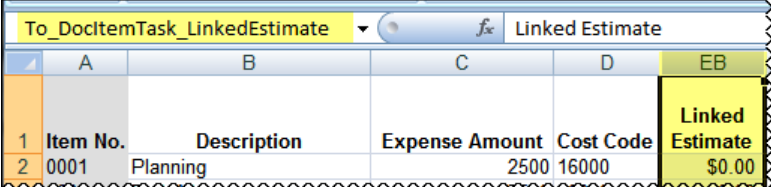
The **Document Items via Microsoft Excel** dialog box will appear.

2. Click  at the Using Template field to browse for your Spitfire Item Template file on your computer.
3. At the **Spitfire Item File** field, change the location of the file that will be created to someplace where you will easily find the file again. You can keep the default filename if you'd like.

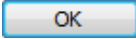


4. Click  to generate a Spitfire Item File from the Spitfire Item Template.
5. Save and close Microsoft Excel

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



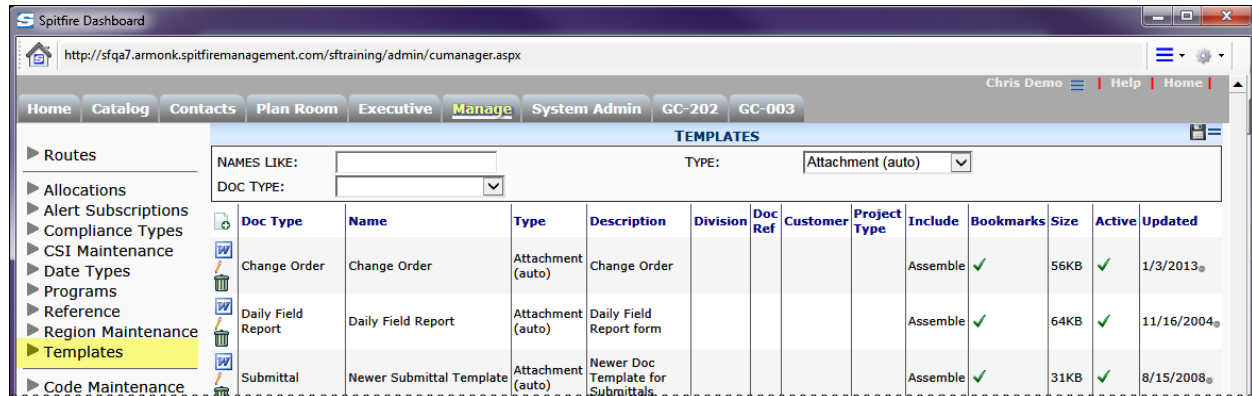
	A	B	C	D	EB
1	Item No.	Description	Expense Amount	Cost Code	Linked Estimate
2	0001	Planning	2500	16000	\$0.00

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

Uploading the Spitfire Item Template

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

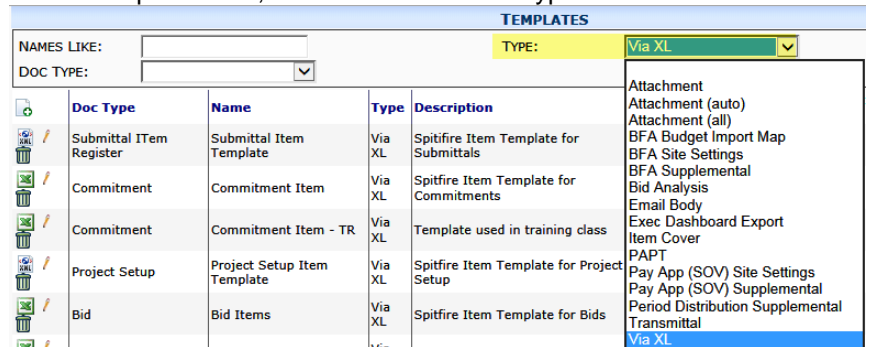
Spitfire Item Templates are uploaded into sfPMS through the Templates tool found on both the Manage and System Admin Dashboards.



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

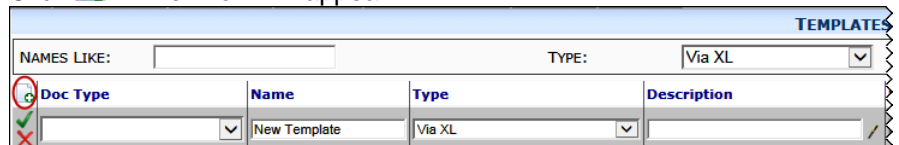
Tutorial

1. In the Templates tool, select **Via XL** as the Type:






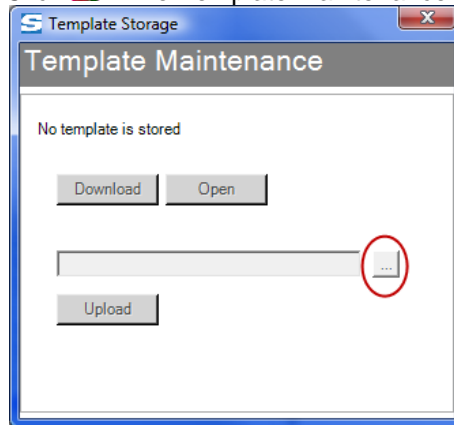
If you have any Spitfire Item Templates already in the template library, they will be listed.


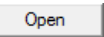





2. Click . A new row will appear.







3. In the **Doc Type** drop-down, select the Doc type for the Spitfire Item Template, for example, **PunchList**.
4. In the **Name** field, enter a short name for this template, such as the name of the file. This is the name that will appear in the Using Template field on the Via Excel dialog box.

5. Leave the **Type** field as **Via XL**.
6. In the Description, type a longer description of the template, for example, **Basic Template for Punchlist Items**.
7. (optional) If you want this template associated with a particular **Division, Doc Reference, Customer** or **Project Type**, look up or select the corresponding information.
8. Click ✓ to accept the row, then  to save.
9. Find your newly added row. It will be marked by .
10. Click . The Template Maintenance dialog box will appear.



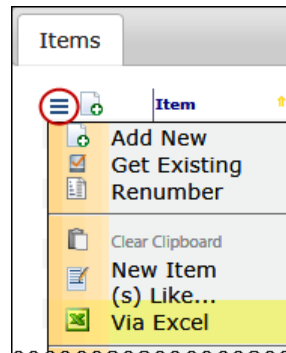
11. Click  then browse for the desired Spitfire Item Template on your computer and click .
12. Back at the Template Maintenance dialog box, click .
13. Click  to close the dialog box.
14. Click  at the Templates tool. The  icon will be replaced by the  icon.

The day of last upload is listed here.

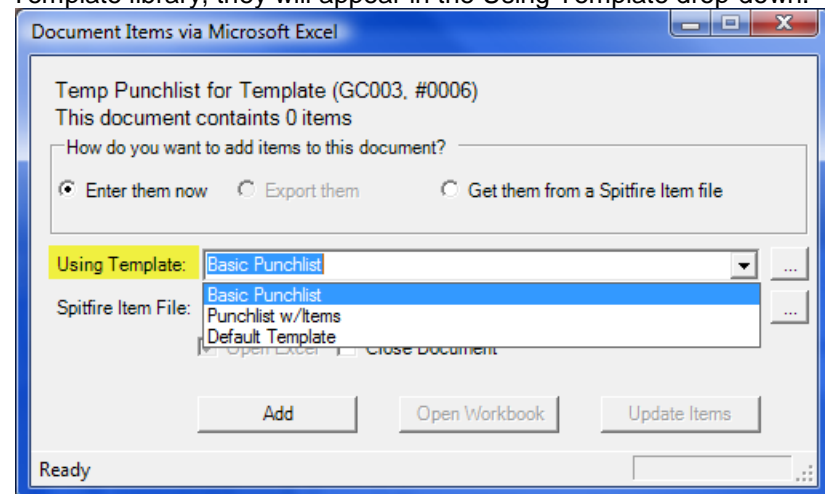
TEMPLATES												
NAMES LIKE:				TYPE:		Via XL						
DOC TYPE:		PunchList										
		Doc Type	Name	Type	Description	Division	Doc Ref	Customer	Project Type	Size	Active	Updated
		PunchList	Basic Punchlist Items	Via XL	Empty template for Punchlist Items					26KB	✓	2/4/2011

Using the Spitfire Item Template

Spitfire Item Templates are used in the **Via Excel** option when you want to add, edit or export Items. The use of the Via Excel option is summarized in the following pages. For more information see the [Focus on Document and Item Basics](#) guide.



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

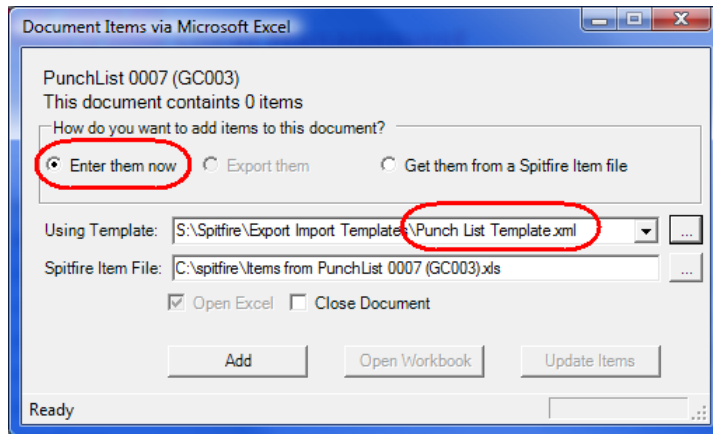


What options you choose on the dialog box will depend on what you want to do.

Add Items to Document with No Items

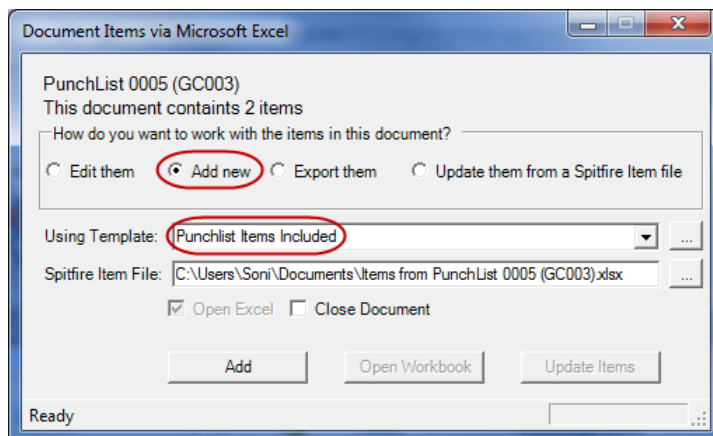
TIP



If you get a message about extraneous data, [see page 36](#).



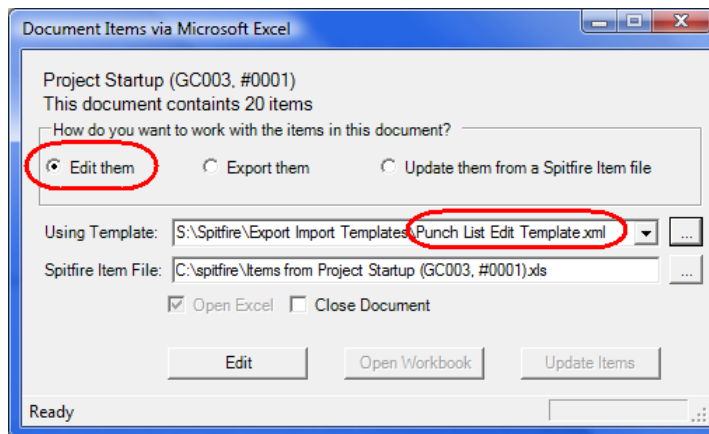
- Select the **Enter them now** radio button.
- Use the **Add** button.
- Enter your information in the Microsoft Excel file that opens. It will be created from the template. When you save and close that Spitfire Item file, the information will be added to your Spitfire document.
Note: if data is not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

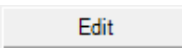
Append Items to Document with Items

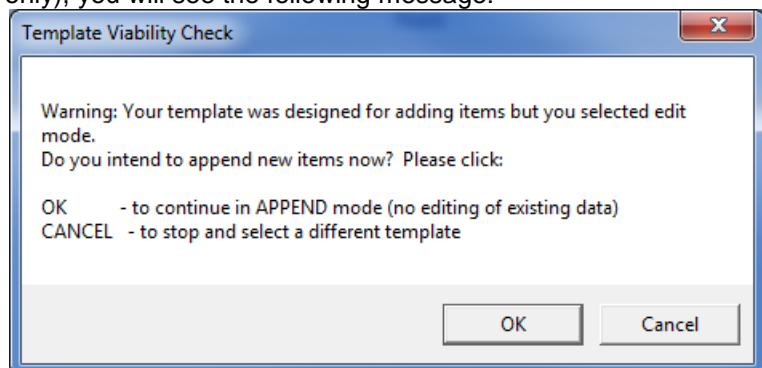


- Select the **Add new** radio button.
- Use the  button.
- Even though there are Items on your document, when Microsoft Excel opens, the file created from the Spitfire Item Template will be blank (i.e., no data).
- Enter your new Items. When you save and close the Spitfire Item file, the new Items will be added to the end of your Spitfire Items.
Note: if data is not automatically uploaded to sfPMS, click the  button.
- When you copy data from another Microsoft Excel spreadsheet to your Spitfire Item file, make sure there are no blank rows between data rows. Delete blank rows if necessary.
- If you need to enter data for a checkbox, enter TRUE or FALSE.

Edit Items

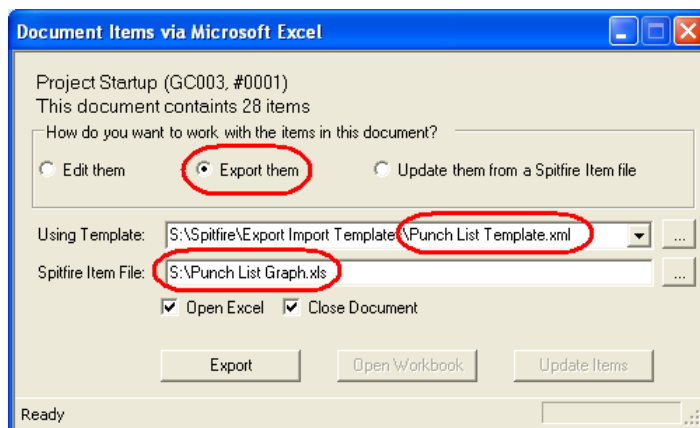


- Select the **Edit them** radio button.
- Use the  button.
Note: if the template you selected contains a **To_RowFlag** column (which is meant for adding Items to an empty document only), you will see the following message:

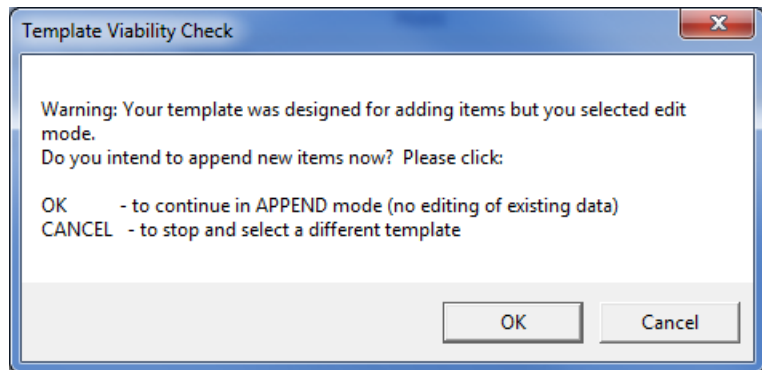


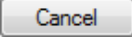
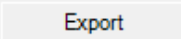
- Click if you want to append newly selected rows from the template to your existing Items. The template will open.
- Click if your intention was to edit (not add or append) Items, then select a different template that is appropriate for editing and click again.
- Make your changes in the Microsoft Excel file that opens. It will be created from the template. When you save and close that Spitfire Item file, the edited information will be added back to your Spitfire document.
Note: if data is not automatically uploaded to sfPMS, click the button.
- Remember that you cannot delete Items unless there is a **To_DeleteRow** column for this purpose.
- Calculated fields in Spitfire cannot be editing in Microsoft Excel.

Export Items

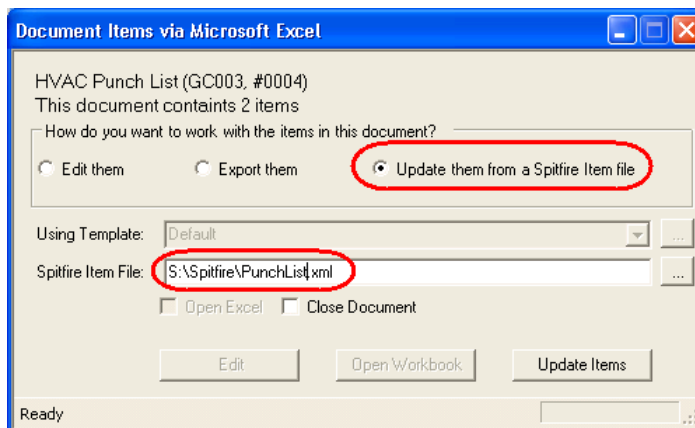


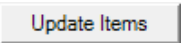
- Select the **Export them** radio button.
- Indicate a path and filename for your Spitfire Item File.
- Use the button.
Note: if the template you selected contains a **To_RowFlag** column (which is meant for adding Items to an empty document only), you will see the following message instead:



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

Import Items



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

Field Names in Appropriate Doc Types

Bid

Details		Scope	Addr	Dates	Items	Incl/Excl
Item	Description	Include	Amount			
DocItem_DocItemNumber 0003-001	DocItem_Description	DocItem_Billable <input checked="" type="checkbox"/>				
SPEC <input type="text" value="DocItem_Specification"/>	PARAGRAPH <input type="text" value="DocItem_Paragraph"/>					
UNITS <input type="text" value="DocItem_ItemQuantity"/>	UOM <input type="text" value="DocItemTask_UOM"/>					
RATE <input type="text" value="DocItemTask_Rate"/>						
AMOUNT <input type="text" value="DocItemTask_RevenueAmount"/>						

Bid Package

Instructions		Address	Items	Incl/Excl	RFQs
Item	Cost Code	Description	Include		
DocItem_DocItemNumber 0330-001	<input type="text"/>	DocItem_Description	DocItem_Billable <input checked="" type="checkbox"/>		
COST CODE <input type="text" value="DocItemTask_ProjEntity"/>	ACCT CATEGORY <input type="text" value="DocItemTask_AccountCategory"/>				
REQUIRED DATE <input type="text" value="DocItem_Due"/>					
UNITS <input type="text" value="DocItemTask_Quantity"/>					
RETENTION METHOD <input type="text" value="None"/>	UOM <input type="text" value="DocItemTask_UOM"/>				
		PERCENT <input type="text" value="0"/>			

CCO

Details		Scope	Addr	Items	Incl/Excl		
Item	Cost Code	Category	Description	Quantity	Net Amount	Rate	
New:001	01000- General Conditions		DocItem_Description				

LINE ITEM	New:001	DocItem_DocItemNumber	DocItemTask_AccountCategory
COST CODE	DocItemTask_ProjEntity	*	ACCT CATEGORY
CAP	<input checked="" type="checkbox"/> DocItemTask_MarkupControl		GL ACCOUNT
UNITS	DocItemTask_Quantity		SUB ACCOUNT
RATE	DocItemTask_Rate		LABOR CLASS
AMOUNT	DocItemTask_ExpenseAmount		UOM
RETENTION METHOD	None	DocItemTask_RetentionMethod	PERCENT
ORIGINAL ESTIMATE	DocItem_OriginalEstimate		QUOTE

Commitment

Details		Scope	Addr	Payees	Dates	Items	Incl/Excl	Compliance
Item	Cost Code	Category	Description	UOM	Quantity	Rate	Original	
0001	DocItemTask_ProjEntity		DocItem_Description					

REQUIRED DATE	DocItem_Due	DocItemTask_AccountCategory	GL ACCOUNT	DocItemTask_GLAcct
ITEM ID	DocItem_SourceItemNumber		SUB ACCOUNT	DocItemTask_GLSub
ORIGINAL UNITS	DocItemTask_Quantity		LABOR CLASS	DocItemTask_LaborClass
RATE	DocItemTask_Rate		COMMITTED UNITS	SPRLineDetails_ContractUnits
ORIGINAL AMOUNT	DocItemTask_ExpenseAmount	<input checked="" type="checkbox"/> DocItemTask_MarkupControl	UOM	DocItemTask_UOM
RETENTION METHOD	None	DocItemTask_RetentionMethod	COMMITTED AMT	SPRLineDetails_ContractAmount
UNITS _ APPROVED	SPRLineDetails_VoucheredUnits		PERCENT	DocItemTask_ItemPercent
AMOUNT _ APPROVED	SPRLineDetails_VoucheredAmount		PENDING CCO UNITS	SPRLineDetails_PendingChangeUnits
			PENDING CCO AMT	SPRLineDetails_PendingChangeExpense

Daily Field Report

Details	Work	Job Safety	Resources	Equipment	Subs	Major Deliveries
Work Done <div style="border: 1px solid gray; padding: 5px; min-height: 100px;"> DocItem_Description </div>		Issues <input checked="" type="checkbox"/> DocItem_Billable	Sub DocItem_ResponsibleParty	Crew Size DocItemTask_Quantity		

Meeting Minutes

Details	Notes	Attendees	Items																								
Item DocItem_DocItemNumber 0018-001	Description <div style="border: 1px solid gray; padding: 5px; min-height: 100px;"> DocItem_Description </div>	Status DocItem_ItemStatus Open	<table border="0"> <tr> <td>DRAWING NUMBER</td> <td>DocItem_Drawings</td> <td>REV</td> <td>DocItem_RevisionNumber</td> </tr> <tr> <td>TOPIC</td> <td>DocItem_ItemType</td> <td></td> <td></td> </tr> <tr> <td>COST CODE</td> <td>DocItemTask_ProjEntity</td> <td></td> <td></td> </tr> <tr> <td>RESPONSIBLE</td> <td>DocItem_ResponsibleParty_dv</td> <td></td> <td></td> </tr> <tr> <td>DUE</td> <td>DocItem_Due</td> <td>COMPLETED</td> <td>DocItem_Completed</td> </tr> <tr> <td>NOTE</td> <td colspan="3"> <div style="border: 1px solid gray; padding: 5px; min-height: 40px;"> DocItemTask_Note </div> </td> </tr> </table>	DRAWING NUMBER	DocItem_Drawings	REV	DocItem_RevisionNumber	TOPIC	DocItem_ItemType			COST CODE	DocItemTask_ProjEntity			RESPONSIBLE	DocItem_ResponsibleParty_dv			DUE	DocItem_Due	COMPLETED	DocItem_Completed	NOTE	<div style="border: 1px solid gray; padding: 5px; min-height: 40px;"> DocItemTask_Note </div>		
DRAWING NUMBER	DocItem_Drawings	REV	DocItem_RevisionNumber																								
TOPIC	DocItem_ItemType																										
COST CODE	DocItemTask_ProjEntity																										
RESPONSIBLE	DocItem_ResponsibleParty_dv																										
DUE	DocItem_Due	COMPLETED	DocItem_Completed																								
NOTE	<div style="border: 1px solid gray; padding: 5px; min-height: 40px;"> DocItemTask_Note </div>																										

Pay Request

Details
Liens
Items

	Item	Cost Code	
▲ 🗑️ 🔄	0001	Electrical	

LINE ITEM	DocRevItem_ItemNumber	Electrical
COST CODE	DocItemTask_ProjEntity	DocItemTask_UOM
COMMITTED UNITS	SPRLineDetails_ContractUnits	UOM <input type="text"/>
COMMITTED RATE	DocItemTask_Rate	
COMMITTED AMOUNT	SPRLineDetails_ContractAmount	TOTAL % COMPLETED
PENDING REQ UNITS	SPRLineDetails_PRInProgressQuantity	TOTAL UNITS COMPLETED
PENDING REQ AMT	SPRLineDetails_PRInProgressAmount	TOTAL AMT COMPLETED
APPR REQ UNITS	SPRLineDetails_VoucheredUnits	CURR REQ UNITS
APPR REQ AMT	SPRLineDetails_VoucheredAmount	CURR WORK AMT
		CURR MATERIAL AMT
		CURR REQ AMT
		CURR RETENTION
		NET PAY AMOUNT

Details
Liens
Items

	Item	Cost Code	Description	Contract	Prior	Qty	Work	Material	Current	% Complete	Retention	Net Amount
▲ 🗑️	0001	16000- Electrical	DocItem_Description Planning /	\$2,500.00	\$2,500.00	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	100.00	<input type="text"/>	<input type="text"/>

Project Setup

Details	Scope	Addr	Dates	Items	Incl/Excl	Project								
<table border="1"> <thead> <tr> <th>Item</th> <th>Description</th> <th>Original</th> <th>Current</th> </tr> </thead> <tbody> <tr> <td>DocItem_DocItemNumber 0001</td> <td>General Conditions DocItem_Description</td> <td>\$25,000.00</td> <td>\$25,000.00</td> </tr> </tbody> </table>							Item	Description	Original	Current	DocItem_DocItemNumber 0001	General Conditions DocItem_Description	\$25,000.00	\$25,000.00
Item	Description	Original	Current											
DocItem_DocItemNumber 0001	General Conditions DocItem_Description	\$25,000.00	\$25,000.00											
SPEC DocItem_Specification		PARAGRAPH DocItem_Paragraph												
UNITS DocItem_ItemQuantity		UOM <input type="text" value="DocItemTask_UOM"/>												
RATE DocItemTask_Rate		REVENUE CODE DocItem_RevenueEntity												
ORIGINAL AMOUNT DocItemTask_RevenueAmount														
CURRENT														
UNITS SPRLineDetails_ContractUnits														
AMOUNT SPRLineDetails_ContractAmount														

Punch List

Items			
Item	Description	Status	
DocItem_DocItemNumber 0006-001	DocItem_Description	DocItem_ItemStatus Open	
COST CODE DocItemTask_ProjEntity			
RESPONSIBLE DocItem_ResponsibleParty_dv			
DUE DocItem_Due		COMPLETED DocItem_Completed	

RFQ

Details Instructions Addr Items Incl/Excl						
Cost Code	Category	Description	Include	Quantity	Net Amount	Rate
		<div style="border: 1px solid gray; padding: 5px;"> DocItem_Description </div>	<input checked="" type="checkbox"/>			

COST CODE	<input type="text" value="DocItemTask_ProjEntity"/>	ACCT CATEGORY	<input type="text" value="DocItemTask_AccountCategory"/>
REQUIRED DATE	<input type="text" value="DocItem_Due"/>		
UNITS	<input type="text" value="DocItemTask_Quantity"/>	UOM	<input type="text" value="DocItemTask_UOM"/>
RATE	<input type="text" value="DocItemTask_Rate"/>		
AMOUNT	<input type="text" value="DocItemTask_ExpenseAmount"/>		
ORIGINAL ESTIMATE	<input type="text" value="DocItem_OriginalEstimate"/>	QUOTE	<input type="text" value="DocItem_OriginalQuote"/>
RETENTION METHOD	<input type="text" value="DocItemTask_RetentionMethod"/>	PERCENT	<input type="text" value="DocItemTask_ItemPercent"/>

Submittal, Submittal Package and Submittal Item Register

Notes	Addr	Items						
Item	Cost Code	Spec	Para	Rev	Description	Item Type	Responsible	Due Status
<div style="font-size: small; color: red;">DocItem_DoItemNumber</div> <div style="font-size: small; color: red;">12348-001</div>					<div style="font-size: small; color: red;">DocItem_Description</div>	<div style="font-size: small; color: red;">DocItem_ItemType</div>		<div style="font-size: small; color: red;">Open</div>
DocItem_ItemStatus								
DocItem_Specification								
SPEC/PARA:REV			/ DocItem_Paragraph			: DocItem_RevisionNumber		
MANUFACTURER			DocItem_Manufacturer					
SUPPLIER			DocItem_Supplier					
SOURCE NUMBER			DocItem_SourceltemNumber					
COST CODE			DocItemTask_ProjEntity					
RESPONSIBLE			DocItem_ResponsibileParty_dv					
REQUESTED			DocItem_Requested			RECEIVED DocItem_Received		
SUBMITTED			DocItem_Submitted			REVIEWED DocItem_Reviewed		
DUE			DocItem_Due			COMPLETED DocItem_Completed		
NOTE			DocItemTask_Note					