Rules and Rule Values

This technical white paper is designed for Spitfire Project Management System users who have access to the System Admin Dashboard. It describes the different values that make up the Rules used in the Spitfire Project Management System (sfPMS).

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Introduction

This technical white paper describes the different values that make up the Rules used in the Spitfire Project Management System (sfPMS). These Rules are added and modified through the Rules Maintenance tool found on the System Admin Dashboard.

This technical white paper assumes you have a basic understanding of sfPMS in general and the Rules Maintenance tool in specific as well as access to the System Admin Dashboard. If not, please read the *Overview Guide* and the Rules Management chapter in the *Focus on System Administration* guide first.

All documentation referred to within this white paper can be found on the Spitfire Help menu.
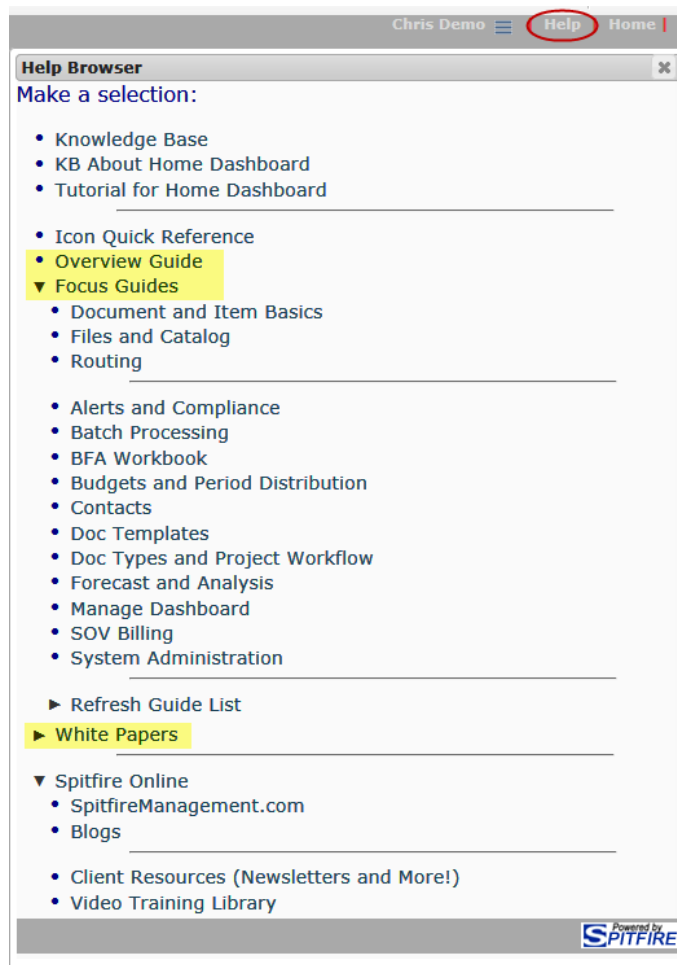
Because of the way this white paper is organized, the table of contents serves as a quick reference guide. This white paper also includes an index.

Note: section, chapters and text that are new or changed from the V4.4 documentation appear with **green text** and sometimes an *

Note:
Changes to a rule might not take effect until the application is recycled.

Rules Maintenance Tool

| Home | Catalog | Contacts | Plan Room | Executive | Manage | System Admin | GC-003 |

RULE MAINTENANCE

GROUP: [ ]   ☐ SHOW CODE SET

	Rule Group	Filter Info	Type	Description
▶	AlertText	AlertTypeKey	String	Provides the format of the alert messages (subject and body) generated for various alert types. [?]
▶	BudgetConfig	DocTypeKey	String	Provides defaults for budget update modes. [?]
▶	CodeSetFilterOverride	DocTypeKey	String	Overrides the default system generated filter for drop down choices. Use this rule as a last resort. See Also: ExcludeCommonChoices, ItemCodeLike and CodeSetRedirect first. Note that $DOCTYPE$ can be used as a placeholder for the document type. [?]
▶	CodeSetRedirect	DocTypeKey	DocTypeKey	Lists the code sets + document type combinations that should be redirected to another document type. This rules is applied at the end of the filter creation and effects the value substituted for the $DOCTYPE$ placeholder [?]
▶	ComplianceNotificationText	ComplianceTypeKey	String	Provides the format of the compliance messages (introduction, notification and action) generated for various compliance types. [?]
▶	CustomerBlock		String	For any customer status, can provide WARNING or BLOCKING message. [?]
▶	DocApproved	DocTypeKey	Boolean	Lists the approving statuses for a document [?]
▶	DocCopyConfig	DocTypeKey	String	Allows customization of how source document data is copied to a new document [?]
▶	DocFormula	DocTypeKey	String	This advanced rule defines computations for the Document Detail part [?]
▶	DocItemConfig	DocTypeKey	String	Allows customization of document items, including the "Get Existing Item" dialog and lookup [?]
▶	DocItemStatusIsApproved	DocTypeKey	Boolean	Lists the statuses that classify a document item as approved [?]
▶	DocItemStatusIsClosed	DocTypeKey	Boolean	Lists the statuses that classify a document item as closed [?]
▶	DocNumbering	DocTypeKey	String	Allows starting document number and number of digits to be set per document type [?]
▶	DocPending	DocTypeKey	Boolean	Lists the pending statuses for a document [?]
▶	**DocStatusIsClosed**	**DocTypeKey**	**Boolean**	**Lists the statuses that classify a document as closed** [?]

RULE ENTRIES

RULE NAME [ ]   DOC TYPE [▼]
☑ SITE ONLY

[▼]	Rule	Filter Value	Result Value	SF
/ 🗎 🌐 🗑	C	CCO	✔	✕
/ 🗎 🌐 🗑	SN	Transmittal	✔	✕

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This documentation indicates Rule Groups and the possible Rules, Filter Values and Result Values for each rule.

Left sidebar navigation:
- Roles
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AlertText

The AlertText rule group is used to format text for the subject and body of Alerts. Spitfire distributes formats for the various Alert types. You can override these using a corresponding test value for the same Alert type. Of course, if you create a custom Alert you should create a format of your choosing, using the Alert Type Key (GUID) as the filter. If you provide a rule with an empty filter, it will override **all** of the Spitfire provided defaults.

See also KBA-01100.

Filter Value

Any Alert type

The AlertText rule group accepts any Alert type (as defined in the Alert Type tool and appearing on the filter drop-down) as the filter value. **Note**: Rules that start with **Cmpl** are used for Compliance Alerts only and do not use filter values.

Result Value

Any text

The AlertText rule group accepts any text as the result value. In addition, the result value text can include any of the following placeholders:

- **$AlertName$** – is replaced by the Alert name.
- **$DocDue$** – is replaced by the due date of the document.
- **$DocNo$** – is replaced by the document number.
- **$DocState$** is replaced by
    - ‘Document is closed‘ if the document is closed
    - ‘Document is due by $DocDue$‘ if the document is due in the future or
    - ‘Document also overdue since $DocDue$‘ if the document is overdue
- **$DocStatus$** – is replaced by the current document status.
- **$DocTitle$** – is replaced by the document title.
- **$DocTitleLong$** – is replaced by the extended title with (project, Doc#) added automatically.
- **$DocType$** – is replaced by the full name of the Doc type.
- **$DuePrep$** – is replaced by
    - ‘due by‘ if the due date has not yet occurred
    - ‘overdue since‘ if the due date has past or
    - the custom text you provide in a separate **AlertText** rule with a TestValue of **DuePrepSoon** or **DuePrepPast**.

- **$HowDue$** – is replaced by

    o 'nearing due' if the due date has not yet occurred

    o 'overdue' if the due date has past or

    o the custom text you provide in a separate **AlertText** rule with a TestValue of **HowDueSoon** or **HowDuePast.**

- **$Info$** – is replaced by information custom to the alert (for example, the Cost Code, Item number, Alert name, etc.)

- **$NowDue$** – is replaced by the item/routee/alert due date.

- **$OldStatus$** – is replaced by the prior status (applicable to 'on change' alerts only).

- **$Pending$** is replaced by

    o 'No approvals are pending, but document remains open' if the document is open but there are no remaining routees or

    o 'Pending action by Who and *nn* others' if there are remaining routees

- **$ProjectID$** – is replaced by the project code.

- **$ProjectName$** – is replaced by the project name.

- **$ShortDocType$** – is replaced by the short version of the Doc type.

- **$WasDue$** – is replaced by the prior due date (applicable to on Change Alerts only).

- **Who** – is replaced by the name of the Responsible user

- **\n** – is replaced by a new line

TIP

Midnight is not displayed in Due dates, but other times will appear.

Rules

Body

Specifies (in the result value) the text to be displayed in the body of the specified Alert.

CmplAmount

Specifies (in the result value) the text to be displayed when the Item is out of compliance because the amount is insufficient.

CmplBody

Specifies (in the result value) the text to be displayed in the body of a Compliance Alert.

CmplEffective

Specifies (in the result value) the text to be displayed when the Item is out of compliance because the Effective date in inadequate.

CmplExpires

Specifies (in the result value) the text to be displayed when the Item is out of compliance because it has expired.

CmplManual

Specifies (in the result value) the text to be displayed when the Item is out of compliance because it has been manually placed out of compliance.

CmplRequired

Specifies (in the result value) the text to be displayed when the Item is out of compliance because the Required date has past.

CmplSubject

Specifies (in the result value) the text to be displayed in the subject of a Compliance Alert.

CompliedOK

Specifies (in the result value) the text to be displayed when the Item is in compliance.

DuePrepPast

Specifies (in the result value) the text to be displayed when an item or document is past due.

DuePrepSoon

Specifies (in the result value) the text to be displayed when the due date of a document, route, or item is approaching.

HowDuePast

Specifies (in the result value) the text to be displayed when you use the **$HowDue$** placeholder in a result value.

HowDueSoon

Specifies (in the result value) the text to be displayed when you use the **$HowDue$** placeholder in a result value.

Subject

Specifies (in the result value) the text to be displayed in the subject of the specified Alert.

BudgetConfig

The BudgetConfig rule controls various optional behaviors of budgeting.

See also KBA-01176.

Filter Value

Certain Doc types

The BudgetConfig rule group accepts any Doc type (as defined in the Doc Types tool and appearing on the filter drop-down) as the filter value. However, only the Doc types of **Budget**, **Change Order**, **Commitment**, **CCO**, **Forecast**, **Payment Requests**, **Period Distribution** and **Project Setup** are relevant to this rule.

Result Value

Varies

Result values for the BudgetConfig rules depend on the rule and are indicated within the description of each rule.

Rules

AllowNoTargets

Specifies (in the result value) whether a document can be posted without updating budget targets.

☐ (✕) = **0,** No.

☑ (✔) = **1,** Yes.

AllowPriorPeriods

Specifies (in the result value) whether a budget revision can be posted to a prior fiscal period.

☐ (✕) = **0,** No.

☑ (✔) = **1,** Yes.

AutomaticBudgetRevisions

Specifies (in the result value) whether the applicable Doc type (Commitment, CCO or Period Distribution) should automatically generate budget revisions. When enabled, Budget Revision and/or Forecast documents may be created and attached to the source document depending on the targets specified in the **InitialTargets** and **UpdateTargets** rules.

Note: if CCO or Commitment revisions are disabled in this way, project Change Orders will no longer post expenses from these documents.

☐ (✕) = **0,** No.

☑ (✔) = **1,** Yes (default).

BFASnapshot

Specifies (in the result value) how financial snapshots of the project are to be created.

0 = Manually, such as for Budgets and Forecasts (default)

136 = Analysis snapshot automatically created and loaded with document window.

BidBudgetTitle

Specifies (in the result value) the title for the Bid Budget document. The default is **As Bid Budget**. (See also the ProjectConfig | BidBudget rule on page 119.)

BidTargets

Specifies (in the result value) which budgets are updated by default on the Bid Budget document. This rule is only referenced when the As Bid Budget document is created on a new project. (See also the ProjectConfig | BidBudget rule on page 119.) The result value indicates the targets for the budgets as follows:

0 = No Target

1 = Original/Bid

2 = EAC

4 = FAC

These values can be added together in the result value to combine multiple targets for the budget data. For example, a value of **3** would update both the Original/Bid and EAC. Not all combinations are valid.

Valid Combinations for Result Values:

0 – No Target

1 - Original/Bid

2 - EAC

3 - Original/Bid and EAC

4 - FAC

6 - EAC and FAC, (valid for Change Order documents ONLY). This is exported to Microsoft Dynamics SL as two budget revisions.

7 - Original/Bid and EAC and FAC

BudgetSubtype

Specifies (in the result value) the Budget SubType (as defined in the Code Maintenance tool) that will be used on budget revision documents created automatically from the specified filter Doc type. This rule aids in setting up predefined routing for Budgets based on how they were created.

BypassDeductiveCCOCheck

(For internal use only)

COExpenseBudgetRevisions

Specifies (in the result value) whether Change Orders should automatically generate and post an internal budget revision to reflect expenses on the Change Order. The expenses are posted when the Change Order is committed and are applied to the budget targets indicated on the document (EAC and FAC by default; see **UpdateTargets** below).

☐ (✕) = **0,** No.

☑ (✓) = **1,** Yes (default).

CORFQLineAwarding

Specifies (in the result value) whether the Change Item Budget Entries window should allow RFQs to be awarded through an icon, automatically creating a CCO from the RFQ.   **Note**: RFQs on the Budget Entries window that are left un-awarded are merged into a single CCO when the Change Item expenses are posted.

☐ (✕) = **0,** No.

☑ (✓) = **1,** Yes (default).

CORFQZeroValueOK

Specifies (in the result value) whether Change Items can automatically process RFQs that have zero value.

☐ (✕) = **0,** No (default). The message "Unawarded RFQ has no value" will appear instead.

☑ (✔) = **1,** Yes. RFQs with zero value will be processed.

DistributeCORevenue

Specifies (in the result value) whether Change Orders should distribute the revenue to the various Cost Codes.

☐ (✕) = **0,** No (default).

☑ (✔) = **1,** Yes.

ForecastDefaultToCompletion

Specifies (in the result value) whether or not automatic budget revisions will post using FTC.

☐ (✕) = **0,** No (default). Automatic budget revisions will post using FAC.

☑ (✔) = **1,** Yes. Automatic budget revisions will post using FTC.

ImportFromCatalog

Specifies (in the result value) the default Doc type for which BFA should enable Catalog searches for budget import source spreadsheets. The result value accepts a Doc type. The default is **Bid**.

InitialBudgetTitle

Specifies (in the result value) the title for the Initial Budget document. The default is **Initial Budget**. (See also the ProjectConfig | ManualBudget rule on page 124.)

InitialTargets

Specifies (in the result value) which budgets are updated by default on the first budget document. This rule is only referenced when the first Budget Revision Doc type on a project is created by Commitment and CCO documents while Commitment Budgeting mode is **I**nitial. Result values for this rule are the same as for BidTargets (see page 25). The default is **2** (EAC).

LimitToBudget

Specifies (in the result value) whether Cost Code/Account categories are limited to the existing EAC budget when the document has all the Post To buckets = 0.

☐ (✕) = **0,** No (default). Cost Code/Account categories can exceed the budget.

☑ (✔) = **1,** Yes.

NetZero:*subtype*

Specifies (in the result value) whether the budget revisions of the specified subtype (as defined as budget revision Subtypes in the Code Maintenance tool) should be prevented from posting unless it is a net zero change to the project. The only supported filter Doc type is **Budget**.

☐ (✕) = **0,** No (default).

☑ (✓) = **1,** Yes.

NoActualsInSnapshotsForBFA

(For future use)

PostActuals

Specifies (in the result value) whether Actuals should be updated when a document (of the **Pay Request** Doc type) is approved. This rule applies to non-integrated sites only; it is ignored for integrated sites because Microsoft Dynamics SL is responsible for updating Actuals.

☐ (✕) = **0,** No. Actuals are not updated upon document approval.

☑ (✓) = **1,** Yes (default). Actuals are updated upon document approval.

PostAutomaticRevisions

Specifies (in the result value) whether automatically created budget revisions and forecasts should be posted. This rule is irrelevant when AutomaticBudgetRevisions = ✕.

☐ (✕) = **0,** No. The automatically created revisions remain editable.

☑ (✓) = **1,** Yes (the default).

PotentialStatusLike

Specifies (in the result value) the DocStatus codes for RFQ (defined in the Code Maintenance tool) that indicate a Potential Commitment. RFQs with a matching status are included in Potential Commitment calculations by the BFA financial snapshot. The Doc type of **RFQ** is the only valid filter value at this time. The default result value is **L%** (which means any RFQ code that begins with L).

PreventNegativeEAC:*subtype*

Specifies (in the result value) whether the indicated subtype of budget revisions (as defined as budget revision Subtypes in the Code Maintenance tool) should be prevented from posting if any budget line would become negative. This protection is sensitive to any revisions that posted between the time the posting snapshot was taken and the present. The only supported filter Doc type is **Budget**.

☐ (✕) = **0,** No (default). Posting will not be prevented.

☑ (✓) = **1,** Yes. Posting will be prevented.

PreventNegativeRemaining

Specifies (in the result value) whether CCOs should be prevented from posting if any Commitment line would then have a negative amount remaining to be paid (including held retention). This protection prevents credits from being entered on new lines; any credit taken on a line must be less than the amount remaining to be paid on the line (including held retention). The only supported filter Doc type is **CCO**.

☐ (✕) = **0,** No (default). Posting will not be prevented.

☑ (✓) = **1,** Yes. Posting will be prevented.

PreventPosting

Specifies (in the result value) whether posting should be disabled for the Doc type.

☐ (✕) = **0,** No (default).

☑ (✓) = **1,** Yes. Posting will result in the message "Posting is disabled at this time."

SoftLineCap

Specifies (in the result value) the amount a capped Commitment line can exceed the contract amount. Any positive number can be indicated. There is no filter for this rule. Sites that are integrated with an accounting system should consult their implementation specialist because a corresponding CCO is required.

0 = hard cap (default).

UDSSourceMode

Specifies (in the result value) the source snapshot mode for the User Save columns in the BFA snapshots (three amount and two text columns). The result value accepts the GUID for the Budget or Forecast Doc type, selected from a drop-down. This rule does not accept a filter value. When no rule entry is specified (the default), values are maintained separately in each mode.

UpdateTargets

Specifies (in the result value) which budgets are updated by default for a given Doc type. This rule is also referenced by Commitment and CCO documents while Commitment Budgeting mode is **U**pdate. Result values for this rule are the same as for BidTargets.

UseLegacyFormula

Specifies (in the result value) whether BFA snapshots taken in prior versions of sfPMS should be presented using BFA workbook formulas from the corresponding version. Additional configuration is required to deploy legacy BFA workbooks (contact your implementation specialist).

☐ (✕) = **0,** No (default).

☑ (✓) = **1,** Yes.

CloudStorageConfig*

The CloudStorageConfig rule group configures options for cloud drive storage. See also KBA-01588.

Filter Value

Any Doc type

The CloudStorageConfig rule group accepts any Doc type (as defined in the Doc Types tool and appearing on the filter drop-down) as the filter value, except where noted.

Result Value

Varies

Result values for the CloudStorageConfig rules depend on the rule and are indicated within the description of each rule.

Rules

CloudPath

Specifies (in the result value) the target folder on the cloud storage provider. You can use either { } or $ placeholders. If the result value begins with a slash (/), it is used as the entire path; otherwise, the result value is added to the end of the project default (if one is specified) or the cloud provider default. The default is **{0}/{1} − {2}/.**

- **{0}** or **$DocTypeName** is replaced by the site name for the Doc type.

- **{1}** or **$Num** is replaced by the document number.
  Note: for item driven publishing, $Num becomes either sfPMS ItemNumber or SourceItemNumber. (See also SourceItemNumber below.)

- **{2}** or **$Title** is replaced by the document title.
  Note: for item driven publishing, $Title becomes the Item description.

- **{3}** or **$CustName** is replaced by the Project Customer name.

- **{4}** or **$ProjectID** is replaced by the Project ID (not masked).

- **{5}** or **$ProjectName** is replaced by the Project name.

- **{6}** or **$Location** is replaced by the Project location.

- **{7}** or **$SourceID** is replaced by Vendor or Source Contact ID.
  Note: for item driven publishing, $SourceID becomes the Item Responsible party.

- **{8}** or **$SourceCompany** is replaced by Vendor or Source company.
  Note: for item driven publishing, $SourceCompany becomes the company of the Item Responsible party.

- **{9}** or **$ItemSpec** is replaced by the Item Spec.

- **{10}** or **$ItemPara** is replaced by the Item Para.

- **{11}** or **ItemType** is replaced by the Item Type description.

FNCheckedOut

Specifies (in the result value) how the filename of an sfPMS file is to be modified when it is checked out. Use **$FN** to include the basic filename in your result (and to support cascading with other FN rules). For example, for the file *Tile Sample.pdf*, the following rule would name the file *Tile Sample (checked out).pdf* when the file is checked out. The default is **0**, which means the filename is not changed for checked out files.

Rule	Filter Value	Result Value
FNCheckedOut		$FN (checked out)

FNGenerated

Specifies (in the result value) how the filename of an sfPMS file is to be modified when it was created from a template. Use **$FN** to include the basic filename in your result (and to support cascading with other FN rules). For example, for the file *Letter.pdf* created from a template, the following rule would name the file *Letter (output).pdf.* The default is **0**, which means the filename is not changed.

Rule	Filter Value	Result Value
FNGenerated		$FN (output)

FNLocked

Specifies (in the result value) how the filename of an sfPMS file is to be modified when it is locked. Use **$FN** to include the basic filename in your result (and to support cascading with other FN rules). For example, for the file *Tile Sample.pdf*, the following rule would name the file *Tile Sample (read-only).pdf* when the file is locked. The default is **0**, which means the filename is not changed for locked files.

Rule	Filter Value	Result Value
FNLocked		$FN (read-only)

LocationCodeSet

Specifies (in the result value) the code set (as defined in the Code Maintenance tool) that is used to determine the location text for the cloud folder path. In order to determine the specific code in the code set, the characters chosen by the **LocationPathFrom**, **LocationPathStart** and **LocationPathLen** rules (below) are used. The description of the specified code becomes the location. This rule does not accept a filter value. The default is to match the Division ID to the Division Name.

LocationPathFrom

Specifies (in the result value) the data source for deriving the location field for the cloud path. This rule does not accept a filter value. The default is **DivisionID**. Possible result values are:

CUSTOMERID = Customer ID
DIVISIONID = Company Division ID
PROJECT = Project ID

LocationPathLen

Specifies (in the result value) the number of characters from the **LocationPathFrom** source to be used to find the code in the **LocationCodeSet**. This rule does not accept a filter value.

LocationPathStart

Specifies (in the result value) the starting point of characters in the **LocationPathFrom** source to be used to find the code in the **LocationCodeSet**. This rule does not accept a filter value. The default is **1**. (See also **LocationPathLen** above.)

LockGeneratedFiles

Specifies (in the result value) whether template-generated files should be locked in the cloud, which means that revisions will be sent, but never updated in sfPMS.

☐ (✕) = **0,** No (default).

☑ (✓) = **1,** Yes.

ProjectPathLen

Specifies (in the result value) the number of characters from the Project ID to be included in the cloud path. This rule does not accept a filter value. (See also **ProjectPathStart** below.)

ProjectPathMask

Specifies (in the result value) a mask for formatting the starting portion of the Project ID to be included in the cloud path. The mask is applied only to the characters selected by the Start and Len rules. This rule does not accept a filter value. There is no default.

ProjectPathStart

Specifies (in the result value) the starting position of the Project ID to be included in the cloud path. This rule does not accept a filter value. The default is **1**. (See also **ProjectPathLen** above.)

SourceItemNumber

Specifies (in the result value) whether the source Item number should replace the Document number when generating the cloud path for the corresponding type. This rule applies only when the Doc type is published by Item (e.g. Submittal Register).

☐ (✕) = **0,** No (default).

☑ (✓) = **1,** Yes.

CodeSetFilterOverride

The CodeSetFilterOverride rule group overrides the default system-generated filter for drop-down choices. We recommend that you use the ExcludeCommonChoices, ItemCodeLike and CodeSetRedirect rule groups instead.

CodeSetRedirect

The CodeSetRedirect rule group indicates the code set plus Doc type combinations that should be redirected to another Doc type.

See also KBA-01077.

Filter Value

Any Doc type

The CodeSetRedirect rules accept any Doc type (as defined in the Doc Types tool and appearing on the filter drop-down) as the filter value.

Result Value

Any Doc type

The CodeSetRedirect rules accept any Doc type (appearing on the result drop-down) as the result value.

Rules

Any code set

Specifies which code set should be redirected from the filter Doc type to the result Doc type.

DateList

Indicates that the list of Date types (as defined in the Date Types tool) should be redirected from the filter Doc type to the result Doc type.

DocReference

Indicates that the list of References (as defined in the Reference tool) should be redirected from the filter Doc type to the result Doc type.

See an example on the next page.

TIP

To remove a Spitfire-defined redirect, override the Spitfire-defined test value by adding a row with the same code set and make the result value Doc type point back to the filter value Doc type, for example, SubType = CCO = CCO.

Example

ComplianceNotificationText

The ComplianceNotificationText rule group provides the text for an introduction, notification and action paragraph on the Compliance Notification document that is generated for various Compliance types.

See also KBA-01200.

Filter Value

Any Compliance type

The ComplianceNotificationText rules accept a Compliance type (as defined in the Compliance Type tool and appearing on the filter drop-down) as the filter value.

Result Value

Any text

The ComplianceNotificationText rules accept any text as the result value. **Note**: there is a 196-character limit in the Result Value field. If your text is longer than 196 characters you will need to

- Split your text into smaller segments, each of any length up to 194 characters,

- Append **$+** to the end of each segment, except the last one,

- Add a rule row for each segment. These rules should have names that indicate they are a continuation of the first rule, for example, Introduction, Introduction.01, Introduction.02, etc.

Your text can also include the following placeholders:

- **\n** is replaced by a new line

- **$$ComplianceAmount$** is replaced by the compliance item amount, if any (see \?)

- **$$ComplianceCarrier$** is replaced by the compliance item carrier, if any (see \?)

- **$$ComplianceDescription$** is replaced by the compliance item description

- **$$ComplianceDue$** is replaced by the compliance item "required by" date and time

- **$$ComplianceExpiration$** is replaced by the compliance item expiration date, if any (see \?)

- **$$ComplianceName$** is replaced by the compliance type name

- **$$ComplianceRoute$** is replaced by the text in the WorkflowRouting test value (see below)

- **\?** ... **\?** -- section enclosed by \? are removed if the section contained any empty replacements

Rules

Introduction

Specifies (in the result value) the text used in the Introduction field on the Compliance Notification document. (This text is stored in xsfDocRevision.Notes.)

Notification

Specifies (in the result value) the text used in the Notification field on the Compliance Notification document. (This text is stored in xsfDocRevision.NoteA.)

Action

Specifies (in the result value) the text used in the Action field on the Compliance Notification document. (This text is stored in xsfDocRevisionNotesB.)

WorkflowRouting

Specifies (in the result value) the option(s) for the ATC: ROUTE command used in the default Compliance Notification workflow script, by way of the $$ComplianceRoute$ placeholder. By default,

ATC: ROUTE **$$ComplianceRoute$** =

ATC: ROUTE **AUTO; AUTOACCEPTED FROM FINAL**

The result value for WorkflowRouting accepts any valid ATC: ROUTE option.

Examples

	Notes	Details	
	INTRODUCTION	We have not yet received your workmans comp insurance. Compliance is critical to the proper schedule.	

	Test Value	Filter Value	Result Value
	Introduction	Workmans Comp	We have not yet received your workmans comp insurance. $+
	Introduction.01	Workmans Comp	Compliance is critical to the project schedule.

Notes | **Details**

INTRODUCTION

We have not yet received your workmans comp insurance. Compliance is
~~critical to the proper~~ schedule.

	Test Value	Filter Value ▾	Result Value
	Notification	Workmans Comp	Please be aware that we reserve the right to withhold payment until this is received.

ISSUE

Please be aware that we reserve the right to withhold payment until this is
received.

Notes | **Details**

INTRODUCTION

We have not yet received your workmans comp insurance. Compliance is
critical to the proper schedule.

	Test Value	Filter Value ▾	Result Value
	Action	Workmans Comp	Please contact us if you have any questions. Thank you in advance for your prompt attention to this matter.

t we reserve the right to withhold payment until this is

ACTION REQUIRED

Please contact us if you have any questions. Thank you in advance for your
prompt attention to this matter.

CustomerBlock

The CustomerBlock rule group provides a warning or blocking message based on customer status. If the customer's status matches one specified in the rule, one of two actions will occur:

- The message indicated as the result value will be displayed and the Project Setup document will not be savable (thus preventing the creation of a new project for this customer).

- The message indicated as the result value will be displayed and if that message begins with the word **WARNING**, the Project Setup document will be savable so a new project can be created for the customer.

See also KBA-01192.

Filter Value

None
The CustomerBlock rule does not use filter values.

Result Value

Any text
The CustomerBlock rules accept any text as the result value. A warning message must begin with the word **WARNING**.

Rules

Reject-*x*
Specifies (in the result value) the message that will be displayed for the specified Customer document's Reason code (as defined in the Code Maintenance tool). Codes can be up to eight characters long.

Status-*x*

TIP

Microsoft Dynamics SL customer statuses used by the Status-*x* test rule are stored in the customer.status field.

Specifies (in the result value) the message that will be displayed for the specified Customer document's DocStatus code (as defined in the Code Maintenance tool) or the customer code defined in Microsoft Dynamics SL. Microsoft Dynamics SL supports the following codes: **A** (for Active), **H** (for Admin Hold), **I** (for Inactive) and **O** (for One time), so, for example, the rule could be **Status-A**, **Status-H**, **Status-I** or **Status-O**.

Example

	RULE MAINTENANCE				
GROUP:				☐ SHOW CODE SET	

	Rule Group	Filter Info	Type	Description	
▲	CustomerBlock		String	For any customer status, can provide WARNING or BLOCKING message.	?

RULE ENTRIES	

RULE NAME		☑ SITE ONLY

	Rule	Filter Value	Result Value	SF
▾				
✎ 📋 🌐 🗑	Status-H		Customer is on Credit Hold. ✎	✕
✎ 📋 🌐 🗑	Status-O		WARNING! Customer is designated as a One-Time Customer. ✎	✕

DocApproved

The DocApproved rule group indicates the list of statuses that approve specific Doc types.

See also KBA-01442.

Filter Value

Any Doc type

The DocApproved rules accept any Doc type (as defined in the Doc Types tool and appearing on the filter drop-down) as the filter value.

Result Value

Yes/No

The DocApproved rules accept a blank ☐ or a checkmark ☑ as the result value.

☐ (✕) = **0,** No. The status does not approve the document.

☑ (✓) = **1,** Yes. The status approves the document.

Rules

Any DocStatus code

The DocApproved rules specify (in the result value) any DocStatus code (from the Code Maintenance tool).

Example

DocCopyConfig

The DocCopyConfig rule group controls various optional behaviors when one document is copied to create another document.

See also KBA-01530.

Filter Value

Any Doc type

The DocCopyConfig rules accept any Doc type (as defined in the Doc Types tool and appearing on the filter drop-down) as the filter value.

Result Value

Varies

Result values for the DocCopyConfig rules depend on the rule and are indicated within the description of each rule.

Rules

AddrFilter

Specifies (in the result value) a Boolean expression that references fields in the xsfDocAddr table. For example,

AddrType in ('S','V') = copy only the specified address types, if present.

FALSE = do not copy any address rows (default).

TRUE = copy all Address rows to the new document.
Note: if the address type already exists on the new document, then the source address is not copied.

AttendeeFilter

Specifies (in the result value) a Boolean expression that references fields in the xsfMeetingAttendee table. For example

FALSE = do not copy any attendee rows to the new document.

IsRegular = copy only attendees marked as Regular to the new document (default).

TRUE = copy all attendee rows to the new document.

AttributeFilter

Specifies (in the result value) a Boolean expression that references fields in the xsfAttribute table. For example,

AttrType in ('OK','VV') = copy only rows with the indicated Attribute types.

FALSE = do not copy any attributes (default).

TRUE = copy all attribute rows to the new document.

IXFilter

Specifies (in the result value) a Boolean expression that references fields in the xsfInclusion table. For example,

FALSE = do not copy any rows in the Incl/Excl tab (default).

ItemType in ('E','A') = copy only exclusions and legal attachments, if present.

Paragraph in ('aaa', '222') = copy only paragraphs aaa and 222.

TRUE = copy all rows in the Incl/Excl tab.

DocFormula

The advanced DocFormula rule group customizes the summary calculations on a document's Detail tab. Formulas and filters follow .NET Data Expression Syntax.

See also KBA-01521.

Filter Value

Any Doc type

The DocFormula rules accept any Doc type (as defined in the Doc Types tool and appearing on the filter drop-down) as the filter value.

Result Value

Varies

Result values for the DocFormula rules depend on the rule and are indicated within the description of each rule.

Rules

Generally, there are three rules for each computation to provide the formula, filter and table. The formula should be relative to the specified table, its PARENT and CHILD values. For the :Using rules, the system supports DocItem, DocItemTask, SPRLineDetails.

cmpExpenseAmount

Specifies (in the result value) the formula for computing the Total Expense Amount. The default is **SUM(ExpenseAmount)**.

cmpExpenseAmount:Filter

Specifies (in the result value) the filter for computing the Total Expense Amount. The default is **TRUE** (meaning all Items).

cmpExpenseAmount:Using

Specifies (in the result value) the table for computing the Total Expense Amount. The default is **DocItemTask**.

cmpOriginalEstimate

Specifies (in the result value) the formula for computing the Total Estimate. The default is **SUM(OriginalEstimate)**.

cmpOriginalEstimate:Filter

Specifies (in the result value) the filter for computing the Total Estimate. The default is **TRUE** (meaning all Items).

cmpOriginalEstimate:Using

Specifies (in the result value) the table for computing the Total Estimate. The default is **DocItem.**

cmpOriginalQuote

Specifies (in the result value) the formula for computing the Total Quote. The default is **SUM(OriginalQuote)**.

cmpOriginalQuote:Filter

Specifies (in the result value) the filter for computing the Total Quote. The default is **TRUE** (meaning all Items).

cmpOriginalQuote:Using

Specifies (in the result value) the table for computing the Total Quote. The default is **DocItem.**

cmpRevenueAmount

Specifies (in the result value) the formula for computing the RevenueAmount. The default is **SUM(RevenueAmount)**.

cmpRevenueAmount:Filter

Specifies (in the result value) the filter for computing the Revenue Amount. The default is **TRUE** (meaning all Items).

cmpRevenueAmount:Using

Specifies (in the result value) the table for computing the Revenue Amount. The default is **DocItemTask.**

CostImpact

Specifies (in the result value) the formula for computing the Cost Impact. The default is **SUM(ExpenseAmount).**

CostImpact:Filter

Specifies (in the result value) the filter for computing the Cost Impact. The default is **PARENT.Billable**.

CostImpact:Save

Specifies (in the result value) whether DocRevision.CostImpact should be updated with the result of this computation when the document is saved. **Note**: this rule is overridden if the **AutoReroute** rule = 2 for this Doc type (see page 73), in which case the system acts as if this rule were TRUE.

☐ (✗) = **0,** No (default).

☑ (✓) = **1,** Yes.

CostImpact:Using

Specifies (in the result value) the table for computing the Cost Impact. The default is **DocItemTask.**

DocItemConfig

The DocItemConfig rules specify options and characteristics for document Items.

See also KBA-01158.

Filter Value

Any Doc type

The DocItemConfig rules accept a Doc type (as defined in the Doc Type tool and appearing on the filter drop-down) as the filter value.

Result Value

Varies

Result values for the DocItemConfig rules depend on the rule and are indicated within the description of each rule.

Rules

AccountEncoding

Specifies (in the result value) whether the GLAcct, GLSubaccount and Account Category fields should be automatically initialized based on internal logic using Vendor and Cost Code. (See also the DocTypeConfig | CanEditEncoding rule on page 74.)

☐ (✕) = **0,** No (default for most Doc types).

☑ (✔) = **1,** Yes (default for CCO, RFQ and Commitment).

AlwaysAllowUnits

Specifies (in the result value) whether unit columns will render even when there is no other units data.

☐ (✕) = **0,** No (default). Unit columns will be hidden when units do not apply.

☑ (✔) = **1,** Yes.

AutoCopyMoveAttachments:*xx*

Specifies (in the result value) whether Item attachments should be moved from old Items with the specified status to new Items, when Items are duplicated through the **AutoCopyWhen** feature (below). *xx* can be any ItemStatus code as defined in the Code Maintenance tool.

☐ (✕) = **0,** No. Item attachments will not be moved.

☑ (✔) = **1,** Yes (default). Item attachments will be moved to the new Items.

AutoCopyResetFields:*statuscode*

Specifies (in the result value) the nullable fields in xsfDocItem that should be set back to null when a new Item is created by the AutoCopyWhen feature. The default field is **Received**. *statuscode* can be any ItemStatus code (as defined in the Code Maintenance tool). The results value accepts a list of fields separated by semicolons.

0 = disable this feature

AutoCopyWhen:*xx*

Specifies (in the result value) whether the AutoCopy feature for the specified status should be enabled. *xx* can be any ItemStatus code as defined in the Code Maintenance tool.

☐ (✕) = **0,** No.

☑ (✓) = **1,** Yes

When enabled, and an Item is saved with the corresponding ItemStatus code, the Item is copied as a new Item on the same document. The new Item is given the status of (O)pen, and Item revision (if numeric) is incremented.

CanGetItems

Specifies (in the result value) whether the Get Existing option will be available on the Item Options menu.

☐ (✕) = **0,** No.

☑ (✓) = **1,** Yes (default).

CanPasteItems

Specifies (in the result value) whether Items will be allowed to be "cut" and "pasted" into Item folders.

☐ (✕) = **0,** No.

☑ (✔) = **1,** Yes (default).

CanRenumberItems

Specifies (in the result value) whether the Renumber option on the Items Options menu will be enabled.

☐ (✕) = **0,** No.

☑ (✔) = **1,** Yes (default).

CostCodeWidth

Specifies (in the result value) the number of width units for the Cost Code display field. The default is **20**.

CrossProject

Specifies (in the result value) if Items on the Get Item lookup (Get Existing option) should come from the same or other project.

0 = from same project only.

1 = from any project.

Project ID = from the template project indicated by the Project ID (without mask characters).

DefaultAcctCategory

Specifies (in the result value) the default Account Category for new Items. There is no default.

DefaultBillable

Specifies (in the result value) whether new Items will be marked billable by default. This rule sets xsfDocItem.Billable; interpretation may vary by Doc type.

☐ (✕) = **0,** No.

☑ (✔) = **1,** Yes.

DefaultGetItemMode

Specifies (in the result value) the default mode for the Get Item option on the Item Options menu. (See also the <u>DocTypeConfig</u> | <u>CanCopyItems</u> rule on page 74.)

Copy = Items get copied to the new document.

Move = Items get moved to the new document.

Linked = Items get copied to the new document and maintain a link with the original document. (Applies only to Commitment-dependent Doc types such as CCO, Pay Requests, Receipts.)

DefaultSort

Specifies (in the result value) how the document Items should be sorted initially. Commas are allowed for sort lists and a space followed by DESC makes the column sorted in descending order.

AUTO = sort by Item Number if visible or by the first visible sortable column if Item Number is not visible (default).

Column = sort by the column specified (as named in the Doc Item table).

Cmpname = sort by the cmp computed value.

DocCopyItemFilter

Specifies (in the result value) the filter to be applied when copying Items from one document of a specific Doc type to another. The filter is used by the Doc Copy dialog box and the Meeting Minutes "create next meeting" function.

The result value accepts a Boolean expression that references fields in the xsfDocItem table, its parents and its children.

Rule	Filter Value	Result Value
DocCopyItemFilter	Meeting Minutes	not itemstatus in ('C')

Note: for this value to matter, **DocTypeConfig | CanCopyItems** must = ✓ (Yes).   By default, Doc types (except for Meeting Minutes) do not use filters when copying Items.

ExpandWhenAdded

Specifies (in the result value) whether a new Item should be shown in Detail view when the Item is first added.

☐ (✗) = **0,** No. Item is shown in Grid view.

☑ (✓) = **1,** Yes (default). Item is shown in Detail view.

ExpandWhenSingle

Specifies (in the result value) how an Item is to be displayed when you first go to the Items tab, on a document with only one Item.

Auto = display the single Item in Detail view only if the Item has no description; otherwise, display the Item in Grid view (default).

No = display the single Item in Grid view (not expanded).

Yes = display the single Item in Detail view (expanded).

GetAllItems

Specifies (in the result value) how the Get All option on the Items Options menu will function.

Yes = the option will be enabled on the Items Options menu.

No = the option will be disabled on the Item Options menu.

Auto = all Items will automatically be copied into the target document.

Smart = all open Items will automatically be copied into the target document.

GetItemModeList

Specifies (in the result value) the options to be offered by the Get Existing Items dialog box for the specified Doc type. The result value accepts any combination of the following. See also the **DefaultGetItemMode** rule.

C = Copy (see also the **ItemCopyMode** rule).

M = Move (see also the **ItemMoveMode** rule).

L = Linked (applicable only to Commitment-dependent documents such as CCO, Pay Request and Receipts).

W = WBS (work-breakdown structure).

GetItemsFromRegister

Specifies (in the result value) the label for the Get Existing from the Item Register option. The default is *Copied from Register*.

0 = disable this option.

GetItemsFromRegisterLookup

Indicates (in the result value) the lookup and validation used by the Get Existing Item dialog in Item Register mode. This is an advanced rule. The format of the result value is *LookupName*;*ValidationName*;*AltValidationName*;*DependsOnValues* where *DependsOnValues* is one to four UI element or #field.table references separated by commas and the defaults are **DocItemList**;**DocItem**;**DocItemAlt;#DocMasterDetail**.**DocTypeKey,#DocMasterDetail**.**DocMasterKey,#DocMasterDetail**.**Project**,**rblMode**.

GetItemsFromSC

Specifies (in the result value) the label for the Get Existing from Commitment option. The default is **Copied from Commitment**.

0 = disable this option.

GetItemsFromSCLookup

Indicates (in the result value) the lookup and validation used by the Get Existing Item dialog in Linked Commitment Line mode. This is an advanced rule. The format of the result value is *LookupName*;*ValidationName*;*AltValidationName*;*DependsOnValues* where *DependsOnValues* is one to four UI element or #field.table references separated by commas and the defaults are **SCOLineItem**,**SCOLineItem;**; **DocMasterDetail.Project,#DocMasterDetail.SubContract**.

GetItemsFromWBS

Specifies (in the result value) the label for the Get Existing from Budget option. The default is **Budgeted Work Breakdown.**

0 = disable this option.

GetItemsFromWBSLookup

Indicates (in the result value) the lookup and validation used by the Get Existing Item dialog in WBS mode. This is an advanced rule. The format of the result value is
LookupName;*ValidationName*;*AltValidationName*;*DependsOnValues*
where *DependsOnValues* is one to four UI element or #field.table references separated by commas and the defaults are
WBSLine;**WBSLine**;;**txtProjectLookup**. For example:

Rule	Filter Value	Result Value
GetItemsFromWBSLookup	Field Directive	WBSExpLine;WBSExpLine;;txtProjectLookup ✎
GetItemsFromWBSLookup	Production Units	ProjectTask;ProjectTask;;txtProjectLookup ✎

GLMapFrom

Specifies (in the result value) the source field from a document to be used when automatically populating the GL Account number field.

BudgetRevID = use the internal budget revision number.

Company = use the name of the company.

DocBatchNo = use the Document batch number.

DocNo = use the Document number.

Location = use the Location.

PayControl = use the Pay Control.

PayItemNumber = use the Pay Item number.

Project = use the Project ID.

ProjEntity = use the Cost Code.

RejectCode = use the Reason or Reject code.

Section = use the Section.

Source = use the Source Item.

SourceDocNo = use the Source number.

SOVItemNumber = use the SOV Item number.

Status = use the document Status.

SubContract = use the Commitment Doc number.

Subtype = use the Subtype.

Title = use the Title or Description.

GLMapLen

Specifies (in the result value) the number of characters in the GLMapFrom field (see above) to be used when automatically populating the GL Account number field. The result value accepts any number less than or equal to 256.

GLMapStart

Specifies (in the result value) the starting position in the GLMapFrom field (see above) to be used when automatically populating the GL Account number field.   The result value accepts any number less than or equal to 256.

GLMapValue*n*

Indicates that a particular value (for example, 16 in **GLMapValue16**) should use the result value as the GL Account number. The result value is any alphanumeric combination.

ItemAccess

Specifies (in the result value) the access that Contacts have to Items on a document. When the result value is R or C, individual users can be granted additional access through corresponding role capabilities (**DOC | Permissions for any item on the document** and **DOC | Can see all items that have the same company**).

A = provide all Contacts view access to all Items.

C = provide Contacts view access to all Items for which their company is responsible.

R = provide Contacts view access only to Items for which the Contact is responsible (default).

ItemCopyLookup

Specifies (in the result value) the lookup and validation used by the Item Copy dialog in copy mode. This rule is an advanced setting. The format of the result value is

LookupName;ValidationName;AltValidationName;DependsOnValues

The default result values are

DocItemList;DocItem;DocItemAlt;#DocMasterDetail.DocTypeKey,#DocMasterDetail.DocMasterKey;#DocMasterDetail.Project,rblMode

ItemCopyMode

Specifies (in the result value) the Copy choice on the Get Existing Items dialog box.

0 = disable this mode so that no Copy choice appears on the dialog box.

Custom text = the label for the Copy radio button on the dialog box. The default for most Doc types is **Copied from another document**.
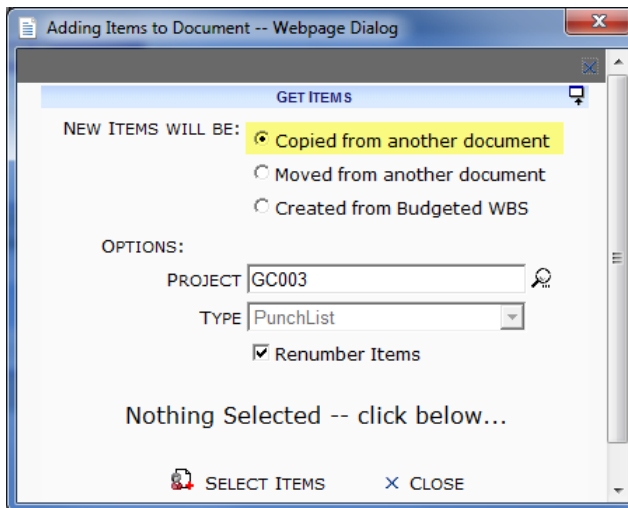
ItemDescriptionRequired

Specifies (in the result value) whether a Description is required for each Item.

☐ (✕) = **0,** No.

☑ (✔) = **1,** Yes.

ItemMoveLookup

Indicates (in the result value) the lookup and validation used by the Get Existing Item dialog in Move mode. This is an advanced rule. The format of the result value is
LookupName;*ValidationName*;*AltValidationName*;*DependsOnValues*
where *DependsOnValues* is one to four UI element or #field.table references separated by commas and the defaults are
DocItemList;**DocItem**;**DocItemAlt**;**#DocMasterDetail**.**DocTypeKey,#DocMasterDetail**.**DocMasterKey,#DocMasterDetail**.**Project**,**rblMode**.

ItemMoveMode

Specifies (in the result value) the Move choice on the Get Existing Items dialog box.

0 = disable this mode so that no Move choice appears on the dialog box.

Custom text = the label for the Move radio button on the dialog box.
The default for most Doc types is **Moved from another document**.
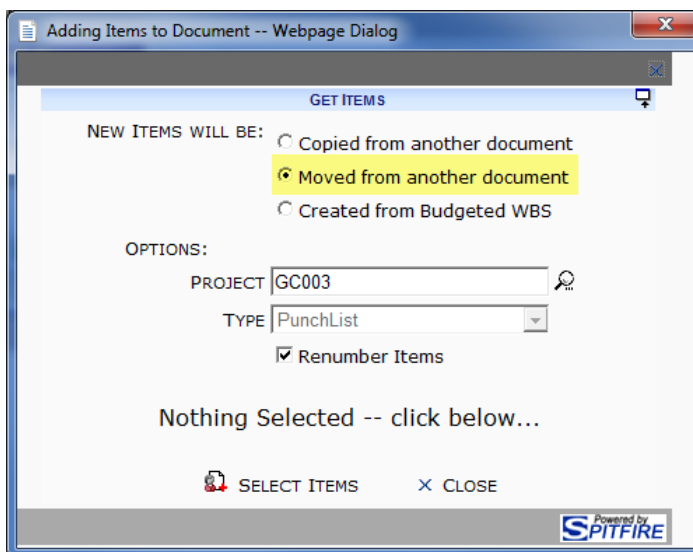
ItemNumberFormat

Specifies (in the result value) the number of digits for Item numbers and if the optional document number prefix is included. The default is **D-3**, meaning three digits with prefix. The result value accepts a number, with or without the prefix **D-**.

ItemStatusForDocApproval

Specifies (in the result value) the status to which open Items should be changed when the document is first saved with an approved status. The result value accepts an ItemStatus code (as defined in the Code Maintenance tool). See also the **DocItemStatusIsClosed** rule.

ItemStatusforDocClosed

Specifies (in the result value) the status to which open Items should be changed when the document is first saved with a closed (but not approved) status. The result value accepts an ItemStatus code (as defined in the Code Maintenance tool). See also the **DocItemStatusIsClosed** rule.

JSIncludes

Indicates (in the result value) the Javascript resources that should be included when the Item tab is rendered. Spitfire includes two resources—**PCOAmountCalculations** and **SPRAmountCalculations**—that are used by Change Order and Commitment-related documents. If no slash (/) is included in the result value, the /cscript/ folder and a .js extension are assumed.

JSInput

Specifies (in the result value) whether the server should accept client-side calculations passed back to update the Item grid.

☐ (✗) = **0,** No (default for most Doc types).

☑ (✓) = **1,** Yes (default for Commitments and Pay Requests).

JSReady:*scriptname*

Specifies (in the result value) the Javascript resources that should be injected into the "On Document Ready" client-side event to initialize client-side features. *Scriptname* can be any of the resources that are valid for the JSIncludes rule (above). There must be a JSIncludes rule for the Doc type that specifies the corresponding *scriptname* in order for the JSReady rule to take effect.

NewItemsLike

Specifies (in the result value) which prior Item to use to provide defaults for new Items.

0 = none; this feature is disabled.

1 = use the first Item by default.

2 = use the last Item by default.

4 = allow the user to select which Item to use.

16 = allow the user to add multiple Items at once.

32 = apply the **AutoCopyResetFields** rule. **Note**: unlike in other scenarios, this usage of AutoCopyResetFields always uses the default Item status because the new Item is always brand new.

PDFMerge

Specifies (in the result value) the name of a merged PDF file and enables the merging of all PDF files (converted from DOC*, XLS*, JPG, TIF, PNG and GIF files attached to Items) with the Item Cover printout when creating an outbound email. Since most implementations will require a unique PDF name for each Item, the result value also accepts replacement markers. These markers can be any string value from the DocItem alias (xsfDocItem).

For example: **Ref-$$SPECIFICATION$$($$PARAGRAPH$$)-Rev#$$REVISIONNUMBER$$** creates filenames based on specification, paragraph and revision. The resulting file would look like **Ref-ABC(3)-Rev#3b.pdf**.

Note: PDFMerge has no effect if there is no Item Cover template for the Item.

Renumber

Specifies (in the result value) if Items from the Get Item dialog (Get Existing option) should be renumbered to match the item numbering of the target document.

Always = items should always be renumbered and users cannot override numbering.

Never = items should never be renumbered and users cannot override numbering.

No = items should not be renumbered, but users can override numbering.

Yes =items should be renumbered, but users can override numbering.

SingleDocOnly

Specifies (in the result value) whether register Items should be excluded from the Get Item lookup (Get Existing option) if the Item is already on another document of the same Doc type as the current target document.

☐ (✕) = **0,** No (default).

☑ (✔) = **1,** Yes.

Sparse*

Specifies (in the result value) whether empty Item Task records should be discarded.

☐ (✕) = **0,** No, preserve Item Task records even when they do not currently store any significant data.

☑ (✔) = **1,** Yes (default).

UseRegisterDoc

Specifies (in the result value) whether Items should be automatically added to a parent document. To be effective, this rule requires the filter Doc type to have a parent Doc type.

☐ (✕) = **0,** No.

☑ (✔) = **1,** Yes.

DocItemStatusIsApproved

The DocItemStatusIsApproved rule group indicates the list of statuses that classify a document Item as approved.

Filter Value

Any Doc type

The DocItemStatusIsApproved rules accept a Doc type (as defined in the Doc Types tool and appearing on the filter drop-down) as the filter value.

Result Value

Yes/No

The DocItemStatusIsApproved rules accept a blank ☐ or a checkmark ☑ as the result value.

☐ (✕) = **0,** the status does not classify the document Item as approved.

☑ (✓) = **1,** the status classifies the document Item as approved.

Rules

Any ItemStatus code

The DocItemStatusIsApproved rules specify (in the result value) any ItemStatus code (from the Code Maintenance tool).

See the example on the next page.

Example

RULE MAINTENANCE				
GROUP:			☑ SHOW CODE SET	

	Rule Group	Filter Info	Type	Description
▲	DocItemStatusIsApproved	DocTypeKey	Boolean	Lists the statuses that classify a document item as approved ?

RULE ENTRIES

RULE NAME			DOC TYPE	
	☐ SITE ONLY			

		Rule	Filter Value	Result Value	SF
		A	Submittal Package	✓	✓
		A	Submittal	✓	✓
		A	Submittal ITem Register	✓	✓
		A	Change Order	✓	✓

CODE SET

SET NAME LIKE: ItemStatus					

	Set Name	Set Type	Flag	Next Set	Size
⁄ ▲	ItemStatus	DocTypeSubcodes		✕	8

SET NAME	ItemStatus	DESCR LIKE:	
CODE LIKE:		DOC TYPE	Submittal

Doc Type	Code	Description
Submittal	A	Accepted
Submittal	O	Open
Submittal	RR	Resubmit

DocItemStatusIsClosed

The DocItemStatusIsClosed rule group indicates the list of statuses that classify a document Item as closed.

Filter Value

Any Doc type

The DocItemStatusIsClosed rules accept a Doc type (as defined in the Doc Types tool and appearing on the filter drop-down) as the filter value.

Result Value

Yes/No

The DocItemStatusIsClosed rules accept a blank ☐ or a checkmark ☑ as the result value.

☐ (✕) = **0,** the status does not classify a document Item as closed.

☑ (✓) = **1,** the status classifies the document Item as closed.

Rules

Any ItemStatus code

The DocItemStatusIsClosed rules specify (in the result value) any ItemStatus code (from the Code Maintenance tool).

See the example on the next page.

Example

DocNumbering

The DocNumbering rule group specifies options and characteristics for document numbering.

See also KBA-01126.

For additional control over document number format, see KBA-01277.

Filter Value

Any Doc type

The DocNumbering rules accept a Doc type (as defined in the Doc Types tool and appearing on the filter drop-down) as the filter value.

Result Value

Varies

Result values for the DocNumbering rules depend on the rule and are indicated within the description of each rule.

Rules

CrossProject

Specifies (in the result value) whether a single sequence of numbers should be used across all projects.

☐ (✗) = **0,** No.

☑ (✔) = **1,** Yes.

Digits

Specifies (in the result value) the number of digits to be used in the document number, for example, **5** (for 10001).

Segment

Specifies (in the result value) the target segment for the document number. When a segment is specified, all subsequent segments will be zero filled. When calculating the next number, only strictly numeric prefixes are considered and the largest numeric prefix will prevail and fill prior segments. For example, if a mask defines three segments (*n-nnn-nn*), the largest number is currently 5-222-33, and Segment = 2, the next document number will be 5-223-00.

0 = use standard numbering.

1 = use the first segment as the target for document numbering.

2 = use the second segment as the target for document numbering.

3 = use the third segment as the target for document numbering.

4 = use the fourth segment as the target for document numbering.

5 = use the fifth segment as the primary target for document numbering.

6 = use the sixth segment as the primary target for document numbering.

StartDocNumber

Specifies (in the result value) the first number to be used in numbering documents, for example, **10000**. If documents already exist for the project/Doc type combination, they provide the starting number so this rule will have no effect.

DocPending

The DocPending rule group indicates the list of statuses that classify a document as pending.

Filter Value

Any Doc type

The DocPending rules accept a Doc type (as defined in the Doc Types tool and appearing on the filter drop-down) as the filter value.

Result Value

Yes/No

The DocPending rules accept a blank ☐ or a checkmark ☑ as the result value.

☐ (✗) = **0,** the status does not classify the document as pending.

☑ (✓) = **1,** the status classifies the document as pending.

Rules

Any DocStatus code

The DocPending rules specify (in the result value) any DocStatus code (from the Code Maintenance tool).

See the example on the next page.

Example

DocStatusIsClosed

The DocStatusIsClosed rule group indicates the list of statuses that classify a document as closed.

Filter Value

Any Doc type

The DocStatusIsClosed rules accept a Doc type (as defined in the Doc Types tool and appearing on the filter drop-down) as the filter value.

Result Value

Yes/No

The DocStatusIsClosed rules accept a blank ☐ or a checkmark ☑ as the result value.

☐ (✕) = **0,** the status does not classify the document as closed.

☑ (✓) = **1,** the status classifies the document as closed.

Rules

Any DocStatus code

The DocStatusIsClosed rules specify (in the result value) any DocStatus code (from the Code Maintenance tool).

See the example on the next page.

Example

DocStatusIsInCloudStorage*

The DocStatusIsInCloudStorage rule group indicates the list of statuses that classify a document as published in the cloud storage mapped to the project.

Filter Value

Any Doc type

The DocStatusIsInCloudStorage rules accept a Doc type (as defined in the Doc Types tool and appearing on the filter drop-down) as the filter value.

Note: the Doc type must also be enabled for cloud sync.

Result Value

Yes/No

The DocStatusIsInCloudStorage rules accept a blank ☐ or a checkmark ☑ as the result value.

☐ (✕) = **0,** the status does not classify a document as published in the cloud storage mapped to the project.

☑ (✓) = **1,** the status classifies the document as published in the cloud storage.

Rules

Any DocStatus code

The DocStatusIsInCloudStorage rules specify (in the result value) any DocStatus code (from the Code Maintenance tool).

See the example on the next page.

Example:

DocStatusIsInPlanRoom

The DocStatusIsInPlanRoom rule group indicates the list of statuses that allow a document to be included in the Plan Room Dashboard.

Filter Value

Any Doc type

The DocStatusIsInPlanRoom rules accept a Doc type (as defined in the Doc Types tool and appearing on the filter drop-down) as the filter value.

Result Value

Yes/No

The DocStatusIsInPlanRoom rules accept a blank ☐ or a checkmark ☑ as the result value.

☐ (✕) = **0,** the status does not allow the document to be included in the Plan Room.

☑ (✔) = **1,** the status allows the document to be included in the Plan Room.

Rules

Any DocStatus code

The DocStatusIsClosed rules specify (in the result value) any DocStatus code (from the Code Maintenance tool).

See the example on the next page.

Example:

DocTypeConfig

The DocTypeConfig rule group specifies options and characteristics for document by Doc types.

See also KBA-01154.

Filter Value

Any Doc type

The DocTypeConfig rules accept any Doc type (as defined in the Doc Types tool and appearing on the filter drop-down) as the filter value.

Result Value

Varies

Result values for the DocTypeConfig rules depend on the rule and are indicated within the description of each rule.

Rules

AllowSingleOpen

Specifies (in the result value) whether sfPMS will prevent the user from starting a new document of the type specified (in the filter value) if the current project already has an open document of the same type. This rule applies only to user-created documents and not to workflow scripts or API.

☐ (✕) = **0,** No (default for most Doc types).

☑ (✓) = **1,** Yes (default for Budget, Forecast, Period Distribution).

AllowUnapprove

Specifies (in the result value) whether approval on a document can be revoked by a user who has the **DOC | Can set document status to Approved** capability.

☐ (✕) = **0,** No (default).

☑ (✓) = **1,** Yes.

AllowUnpending

Specifies (in the result value) whether users can change the status of a Pending/Committed document back to In Progress.

☐ (✕) = **0,** No.

☑ (✓) = **1,** Yes (default).

<div style="float:left">

TIP

See the technical white paper *Designing User Roles* for more information about role capabilities.

</div>

AllowUnpending:*x*

Specifies (in the result value) whether users can change the specified status (specified through a DocStatus code, for example, **AllowUnpending:P**) of the document back to In Progress.

☐ (✕) = **0,** No.

☑ (✔) = **1,** Yes.

AutoAttach

Specifies (in the result value) that attachments found on a document of the source Doc type with the specified DocStatus code (as defined in the Code Maintenance tool) are to be automatically copied to a new document of the filter Doc type. Source Doc types are indicated by GUID and are entered in the result value in the form

DoctypeGUID;StatusCode

For example, **715D2C09-EE06-46FB-ADEE-801FE9954245;S** will copy all attachments from any drawing documents with status S. (The GUID and status code must be separated with a semicolon.)

You can include multiple pairs of source type and statuses, for example **715D2C09-EE06-46FB-ADEE-801FE9954245;S;715D2C09-EE06-46FB-ADEE-801FE9954245;V.** You can vary Doc type and/or status; use **;;** for all statuses within a given type.

AutoAttach:*subtype*

Specifies (in the result value) that attachments found on a document of the source Doc type with the specified DocStatus code are to be automatically copied to a new document of both the filter Doc type and the indicated subtype. This rule has no effect if a result value has been specified for AutoAttach (no subtype) for the same filter Doc type. Source Doc types are indicated by GUID and are entered in the result value in the form

DoctypeGUID;StatusCode

AutoAttachFromDoc

Specifies (in the result value) that attachments found on a specific source document are to be automatically copied to a new document of the filter Doc type. Source documents are indicated by GUID and are entered in the result value in the form

DocumentGUID

AutoAttachFromDoc:*subtype*

Specifies (in the result value) that attachments found on a specific source document are to be automatically copied to a new document of both the filter Doc type and the indicated subtype. This rule entry has no effect if a result value has been specified for AutoAttachFromDoc (no subtype) for the same filter Doc type. Source Doc types are indicated by GUID and are entered in the result value in the form

DoctypeGUID

AutoAttachIXFilter

Specifies (in the result value) whether or not inclusions and exclusions should also be copied from the documents identified by the AutoAttach* rule to documents of the filter Doc type. This rule entry is ignored unless an AutoAttach* rule has also been specified.

FALSE = do not copy inclusions and exclusions.

TRUE = copy all inclusions and exclusions.

AutoAttachIXFilter:*subtype*

Specifies (in the result value) whether or not inclusions and exclusions should also be copied from the documents identified by the AutoAttach* entry to documents of both the filter Doc type and the indicated subtype. This rule is ignored unless an AutoAttach* rule has also been specified.

AutoReroute

Specifies (in the result value) when a document should automatically attempt to resolve a predefined route.   **Note**: the AutoReroute option is in effect only until the document is sent on its route (i.e., leaves Seq 1).

0 = do not use any predefined route for the Doc type; only manual routing is allowed.

1 = search for a predefined route each time the document is saved until a non-empty route is found (default).

2 = reset (discard) the existing predefined route and search for a new predefined route if the total expense amount on the document changes

3 = search for a predefined route each time the document is saved until a non-empty route is found but also reset that route and search for a new predefined route if the total expense amount on the document changes.

4 = reset any existing predefined route and search for a new route each time the document is saved. **Warning**: this is extremely resource-expensive and should be used sparingly!

16 = refresh the current predefined route each time the document is saved. This option conflicts with 4.

17 = search for a predefined route each time the document is saved until a non-empty route is found, and then refresh that route each time the document is saved.

18 = reset the existing predefined route and search for a new route if the total expense amount on the document changes, and then refresh the new route each time the document is saved.

19 = search for a predefined route each time the document is saved until a non-empty route is found (but also reset that route and search for a new predefined route if the total expense amount on the document changes), and refresh the route each time the document is saved.

AutoRerouteAmount

Specifies (in the result value) whether a document should automatically re-evaluate the default route if the total expense amount on the document changes and the document is still at route Seq 1. **Note**: This rule was deprecated in V4.1 because AutoReroute = 2 serves the same purpose.

☐ (✕) = **0,** No.

☑ (✔) = **1,** Yes.

CanCopy

Specifies (in the result value) whether documents of the specified Doc type can be copied.

☐ (✕) = **0,** No.

☑ (✔) = **1,** Yes (default).

CanCopyItems

Specifies (in the result value) whether Items on a document can be copied through the document copy icon (🗐) and the copy- items-from-the-Items-tab feature.

☐ (✕) = **0,** No (default for custom Doc types)

☑ (✔) = **1,** Yes (default for Spitfire-supplied Doc types).

CanEditEncoding

Specifies (in the result value) whether a user with the **DOC | Update account encoding** Role capability has access to account coding fields regardless of document status.

☐ (✕) = **0,** No (default).

☑ (✔) = **1,** Yes.

CustomSaveExtensions

Specifies (in the result value) whether document save transactions can be extended. For performance reasons, changes to this setting do not take effect until the next application recycle. See KBA-01183 for details on configuring save extensions.

☐ (✕) = **0,** No.

☑ (✔) = **1,** Yes.

DescendantTitle

Specifies (in the result value) the prefix to use in front of the parent document's title when creating the title for a subordinate document. The result value accepts any text.

DocHeight

Specifies (in the result value) the document height in pixels for the specified Doc type. The result value accepts a number.

DocNoMaskName

Specifies (in the result value) the name of the mask (defined in the Mask Maintenance tool) to be used for entering new document numbers.

DocWidth

Specifies (in the result value) the document width in pixels (if the number is greater than 0) or percentage of the computer screen (if the number is less than 0) for the specified Doc type. For example, **-75** indicates 75% of the screen width. Most document widths are around 600.

DocWindowTitle

Specifies (in the result value) how the document browser window should be titled. The result value accepts free-form text intermixed with references to character fields (in the format of $*FIELDNAME*$) in the document header of the document. The default is **$DOCTYPE$ - $DOCSTATUS$**. Other common fieldnames are **$TITLE$** and **$DOCNO$**.

DueDaysRelative

Specifies (in the result value) whether sfPMS should attempt to adjust the due date to keep it relative to the doc date whenever the doc date is changed.

☐ (✕) = **0,** No (default).

☑ (✓) = **1,** Yes.

DueInDays

Specifies (in the result value) the number of days in which new documents are defaulted as being due.

-1 = no default due date.

1 = due in 1 day (default).

n = due in *n* days.

ExpressDocAttach

Specifies (in the result value) the Doc type for which the Doc Attach tool will filter when the icon on the Attachment grid is clicked. The default Doc type is **Issue**.

ExpressDocAttachFiles

Specifies (in the result value) the Doc type for which the Doc Attach tool will filter when the icon on the Attachment grid is clicked. The default Doc type is **Drawings**.

FirstAddrType

Specifies (in the result value) the AddrType code (as defined in the Code Maintenance tool) to indicate the initial address type for the Addr tab on the specified Doc type.
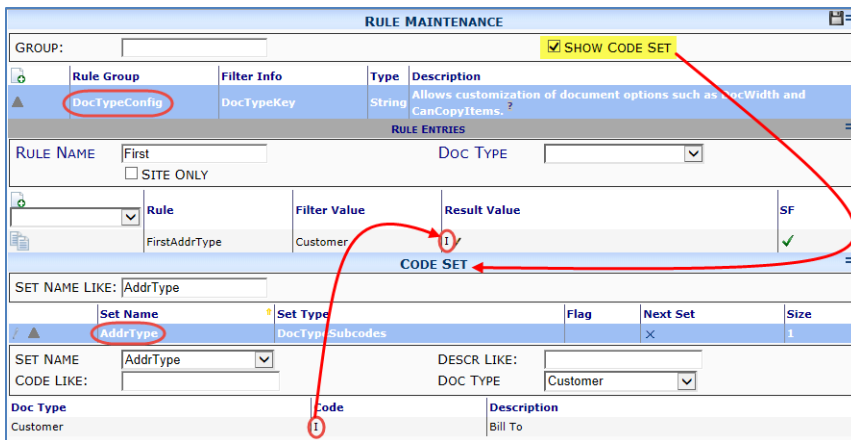
FirstAxRTab

Specifies (in the result value) the initial tab for the Attachment/Routing section of the document.

AUTO = Attachment tab, if any attachments exist; otherwise, Route Detail tab (default).

Attachments = Attachment tab.

Route = Route Detail tab.

FiscalPeriod

Specifies (in the result value) how the fiscal period for new documents should be initialized.

AUTO = the year/month of the document creation is used.

DSL = initialization comes from Microsoft Dynamics SL (default for DSL-integrated sites).

OFF = the fiscal period is left unspecified and is set when approved/posted (similar to v2.1 behavior).

YYYYMM = a specific year and month is used.

HardCopyThru

Specifies (in the result value) the Contact (from the Active User lookup) that should be inserted into the routing sequence prior to a hard copy routee.
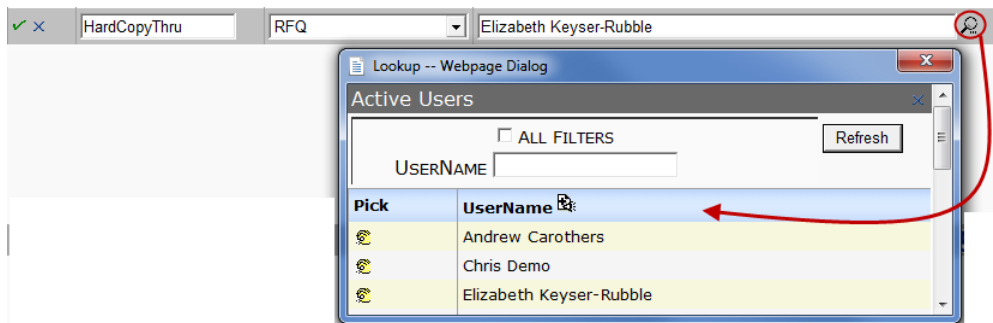
ItemAttachments

Specifies (in the result value) whether Attachments can be associated with Items on the filter Doc type.

0 = No (default for most Doc types).

1 = Yes (default for Submittal, Submittal Package, Submittal Item Register, Change Order and Proposed CO Doc types).

Always = the Add Files tool will automatically add Items to the document when no Item matches the Attachment.

ItemAttachments

Specifies (in the result value) how the system should handle attachments with expanded Items.

0 = prevent attachments from being automatically associated with expanded Items (default for most Doc types).

1 = automatically associate attachments with expanded Items (default for Submittal, Submittal Package, Submittal Item Register, Change Order and Proposed CO Doc types).

Always = have the Add Files tool add Items when no matching Item is found on the document.

ItemFilterOver

Specifies (in the result value) the number of Items on a document that should display the Item filters by default. If the document has more Items that the result value, filters are displayed. The default is **30**.

ItemsPerPage

Specifies (in the result value) the number of items per page in Item Grid view. The default is **6**.

ItemsPerPageExtended

Specifies (in the result value) the number of items per page in Item Grid view when the Document Header section is collapsed. The default is **18**.

ItemText

Specifies (in the result value) the field from which an Item's description will default. The result value accepts a field from the Doc Item or Doc Item Task table, especially the following:

ItemType = the description will come from the ItemType field.

ItemSubtype = the description will come from the ItemSubtype field.

ItemSource = the description will come from the ItemSource field.

CSIExtended = the description will come from the extended description field for the CSI code in the CSI Maintenance tool.

ProjEntity = the description will come from the Cost Code description.

LimitApprover

Specifies (in the result value) the class of user allowed to approve a document (of the Doc type indicated in the Filter).

Approver = anyone with the DOC | Can set document status to Approved rule capability can approve the document (default).

Creator = anyone with the above rule capability who also creates a document can approve that document.

Owner = anyone with the above rule capability who also has the **DOC | Owns documents created, routed, global** rule capability can approve the document.

LimitWebRouting

Specifies (in the result value) whether users with Route Via set to **Web (Conditional)** should be treated as Route Via Email/Fax routees for the filter Doc type.

☐ (✕) = **0,** No. All documents will be routed to the user's Spitfire Inbox.

☑ (✓) = **1,** Yes (default).

ManualDocNo

Specifies (in the result value) whether users must enter a document number using a mask. (See also DocNoMaskName on page 75.)

☐ (✕) = **0,** No.

☑ (✓) = **1,** Yes.

NewDocWindowTitle

Specifies (in the result value) how the document browser window of a new document should be titled. The result value accepts free-form text intermixed with references to character fields (in the format of $*FIELDNAME*$) in the document header of the document. The default is **$DOCTYPE$ - $DOCSTATUS$**. Other common fieldnames are **$TITLE$** and **$DOCNO$**.

OfficeBodyLink

Specifies (in the result value) whether the 📊 and 📄 icons should appear on the mid-section tab area of the document.

☐ (✕) = **0,** No (default for most Doc types).

☑ (✓) = **1,** Yes.

OfficeLinkType

Specifies (in the result value) which icon will appear on the mid-section tab of the document (and whether a Microsoft Word or Microsoft Excel template is expected). Prior to V4.2, this was called TemplateType.

doc = 📄, Microsoft Word (default).

xls = 📊, Microsoft Excel.

OneAddrType

Specifies (in the result value) whether the user is limited to the default address type in the Addr type.

☐ (✗) = **0,** No. The user can change address types.

☑ (✔) = **1,** Yes.

PreventCreate

Specifies (in the result value) whether documents of the filter Doc type should be prevented from creation. The web service and datalayers are not restricted by this setting.

☐ (✗) = **0,** No (default). Documents are not prevented from being created.

☑ (✔) = **1,** Yes.

PreviewAttachments

Specifies (in the result value) the width of the preview thumbnail that can appears on the Attachments tab. The result value accepts any number up to and including 256. When the result value is **20** or more, the document attachment grid will show a preview of JPG and TIF images using the result value to specify the thumbnail width. Default is **0** (no preview). Any number under 20 also means no preview.

Priority

Specifies (in the result value) the default priority for new documents.

1 = Urgent

3 = High

5 = Medium

7 = Low

9 = FYI

Probability

Specifies (in the result value) the default probability for new documents. The result value accepts any number between 0 and 100 inclusive.

ProjectDateTarget

Specifies (in the result value) the Doc Date Name (as set up in the Date Types tool) that, when required on the specified Doc type, will populate with the current project's contract dates. The result value accepts any Doc Date Name and can include a * as a mask. There is no default except for the Commitment Doc type, which defaults to Commitment Current.

0 = disable this rule.

ProjectIsOptional

Specifies (in the result value) whether a document can be created by users when there is no project.

☐ (✕) = **0,** No.

☑ (✔) = **1,** Yes.

Subtype

Specifies (in the result value) the default SubType code (as established in the Code Maintenance tool) for new documents.

TemplateRevisionCopy

Specifies (in the result value) whether current templates are carried forward to new revisions.

☐ (✕) = **0,** No (default for non-Microsoft Word Templates).

☑ (✔) = **1,** Yes (default for Microsoft Word Templates).

TitleEditable

Specifies (in the result value) when users may update the document title. Otherwise, by default, only those users with access set through Role capabilities may change the document title.

Always = users can update the title regardless of document status.

Open = users can update the title until the document is closed.

XmitBody

Obsolete as of V4.2.

EMailText

The EMailText rule group allows customization of outbound e-mail.

See also KBA-01394.

Filter Value

Any Doc type

The EMailText rules accept a Doc type (as defined in the Doc Types tool and appearing on the filter drop-down) as the filter value.

Result Value

Any text

The EMailText rules accept any text as the result value. **Note**: there is a 196-character limit in the Result Value field. If your text is longer than 196 characters you will need to

- Split your text into smaller segments, each of any length up to 194 characters,

- Append **$+** to the end of each segment, except the last one,

- Add a test value row for each segment. These test values should have names that indicate they are a continuation of the first test value, for example, Introduction, Introduction.01, Introduction.02, etc.

The result value text can include the following placeholders (unless otherwise indicated in the test value descriptions below):

Bookmark-style

- **[DocHeader_DocNo]** is replaced by the document number.

- **[DV_DocHeader_DocTypeKey]** is replaced by the document's Doc type.

- **[DM_DocHeader_Project]** is replaced by the masked Project ID.

- **[DV_DocHeader_Project]** is replaced by the description of the Project.

- **[DocHeader_Title]** is replaced by the document title or description.

- **[DocRevision_Notes]** is replaced by the first Notes field in the document.

- **[DocRevision_NoteA]** is replaced by the second Notes field in the document.

- **[DocRevision_NoteB]** is replaced by the third Notes field in the document.

- **[DocRevision_NoteEML]** is replaced by the Message field in the Message tab of the document.

$$ - style

- **$$DOCNO$$** - is replaced by the document number.
- **$$DOCTYPE$$** - is replaced by the document's Doc type.
- **$$P.PROJECT$$** - is replaced by the word **Project** if there a Project ID.
- **$$PROJECT$$** - is replaced by the Project ID.
- **$$PROJECTNAME$$** - is replaced by the title of the project.
- **$$REV.NOTEEML$$** - is replaced by the Message field in the Message tab of the document.
- **$$SENTWHY$$** - is replaced by the word "Routed" or "CC'd" depending on the routee's route status.
- **$$TITLE$$** - is replaced by the title on the document.
- **$$TO.DUE$$** - is replaced by the due date for the routee.
- **$$TO.REQUEST$$** - is replaced by the Instructions field for the routee.
- **$$TO.NOTE$$** - is replaced by the Notes field for the routee.

Rules

EchoFormat

Specifies (in the result value) the format used when echoing the route response text into the field specified by the **ResponseEchoTo** rule. The default result value, which creates a pre-pended flow of responses, is

\nFrom: *{1}*\nReceived:*{0}*\n\n*{3}*\n\-*{2}*

Where

- **{0}** is replaced by the date and time the addition was recorded
- **{1}** is replaced by the contributor's name
- **{2}** is replaced by the prior contents (history text)
- **{3}** is replaced by the new response text
- **\n** is replaced by a new line
- **\-** is replaced by a separator line

IERApproved

Specifies (in the result value) the content of the email that is sent when a Via Email routee replies to an email with **Reply: Accepted** or **Reply: Approved**. The default is "**Your affirmative response has been noted.**"

IERAutoSentOnForReview

(*Made obsolete in V4.2*)

IERCCNAA

Specifies (in the result value) the content on the email that is sent when a Via Email – CC'd routee replies to an email with **Reply: Accepted** or **Reply: Approved**. The default is "**Your affirmative response has been noted.**"

IERCCNAB

(*Made obsolete in V4.2*)

IERCCNAH

Specifies (in the result value) the content of the email that is sent when a Via Email – CC'd routee replies to an email with **Reply: Hold**. The default is "**Your response has been noted, but the document cannot be held by you since you only received a courtesy copy.**"

IERCCNAR

Specifies (in the result value) the content of the email that is sent when a Via Email – CC'd routee replies to an email with **Reply: Rejected**. The default is "**Your negative response has been recorded.**"

IERCCOK

(*Made obsolete in V4.2*)

IERHeld

Specifies (in the result value) the content of the email that is sent when a Via Email routee replies to an email with **Reply: Hold**. The default is "**You are holding the document for further action.**"

IERNoDisposition

(*Made obsolete in V4.2*)

IERNoRteHeader

Specifies (in the result value) the inbound email response that is sent when the inbound email did not include the entire Spitfire header. The default is "**The message did not include the internal routing header.**"

IERNoSFHeader

Specifies (in the result value) the inbound email response that is sent when the inbound email did not include the Spitfire header. For example, this could be an unsolicited email instead of a reply. The default is **"The message did not include the internal document ID header**."

IERRejected

Specifies (in the result value) the content of the email that is sent when a Via Email routee replies to an email with **Reply: Rejected**. The default is "**Your negative response has been recorded.**"

IERRejectIntro

Specifies (in the result value) the content of the first paragraph of the inbound email response that is sent when the system cannot process an inbound message. The default is "**Your message could not be processed by our automated system. Please resend your message to an appropriate individual for manual review**."

0 = disable the message.

IERSentBack

(*Made obsolete in V4.2*)

IERSentOn

Specifies (in the result value) the inbound email response that is sent when a user replies without an explicit REPLY directive. The default is "**Your e-mail message has been added to the document and the document has been sent on.**"

0 = disable the message.

IERSFHeaderMal

Specifies (in the result value) the inbound email response that is sent when the inbound email included the Spitfire header, but the data in the header was malformed. The default is "**The message internal document id header was malformed: $$**" where the **$$** is replaced by the data that was recovered from the header.

IERSFRouteGone

Specifies (in the result value) the inbound email response that is sent when the inbound email indicated a routing that does not (or no longer) exists. Default is *"***Your message about *{0}* cannot be accepted. You are not (or no longer are) included in the document routing**." If included, the *{0}* is replaced by the document title.

IERSFRouteMal

Specifies (in the result value) the inbound email response that is sent when the inbound email included the Spitfire header, but the routing data in the header was malformed. Default is "***The message internal route id header was malformed: $$"*** The **$$** is replaced by the malformed data that was recovered from the header.

IERSFRouteOld

Specifies (in the result value) the inbound email response that is sent when the inbound email indicated a routing that has already been responded to more than a day ago. (The system accepts "Oh yeah, and..." responses for up to 24 hours). Default is "**Your message about *{0}* is in reference to an internal route ID which was completed more than 1 day ago (on *{1}*)**" If included, *{0}* is replaced by the document title and *{1}* is replaced by the original date.

IncludeAttachViaEmailLink

Specifies (in the result value) whether the message added to the bottom of an outbound email should include a link that can be used to send files back to be attached to the document. See the **LinkToSendFilesFormat** rule below.

☐ (✕) = **0,** No (default).

☑ (✓) = **1,** Yes.

IsResend

Specifies (in the result value) the message added at the top of a resent email message. The default is **<p>Please Note: This is a resend of a prior email that was originally sent *{1:d}* at *{1:t}*. The prior email is also included in PDF format.</p>** where *{0}* (not shown in the default) is replaced by the attachment name, *{1:d}* is replaced by the original send date, and *{1:t}* is replaced by the original send time.

LinkToContentFormat

Specifies (in the result value) how the link to the downloadable content is placed in the outbound message. The default is **<p>*{0}* *{1}* </p>** where *{0}* is replaced by the **LinkToContentMsg** text and *{1}* is replaced by the anchor tag, including the **LinkToContentTag** text.

0 = disable the message.

LinkToContentFormatCC

Specifies (in the result value) the link format for CC'd routees that overrides the **LinkToContentFormat** result value.

0 = disable the message.

LinkToContentMsg

Specifies (in the result value) the message added at the bottom of an outbound email message to provide the URL to the downloadable content. The default is **Download the *{0}* file*{1}*, approximately {2:N1}MB** where *{1}* is replaced by the letter **s** if the number of attachments is greater than one; *{0}* is replaced by the number of attached output files (which can include transmittal template, report, and document attachments) and *{2:N1}* is replaced by the size of the download in MB. This rule is ignored if **LinkToContentFormat** = 0.

LinkToContentMsgCC

Specifies (in the result value) the message for CC'd routees that overrides the **LinkToContentMsg** result value.

0 = disable the message.

LinkToContentTag

Specifies (in the result value) the anchor text for the URL to the downloadable content. The default is **using this link**. This rule is ignored if **LinkToContentFormat** = 0.

LinkToContentTagCC

Specifies (in the result value) the anchor text for CC'd routees that overrides the **LinkToContentTag** result value.

0 = disable the message.

LinkToRespondFormat

Specifies (in the result value) how the link to the Response Wizard is placed in the outbound message. The default is **<p>{0} {1} </p>** where *{0}* is replaced by the **LinkToRespondMsg** text and *{1}* is replaced by the **LinkToRespondTag** text.

0 = disable the message.

LinkToRespondFormatCC

Specified (in the result value) the format for CC'd routees that overrides the **LinkToRespondFormat** result value.

0 = disable the message.

LinkToRespondMsg

Specifies (in the result value) the message added at the bottom of an outbound email message to provide the URL to respond via a web browser. The default is **You may record your response by replying to this email and/or by** (usually followed by the **LinkToRespondTag** text). This rule is ignored if **LinkToRespondFormat** = 0.

LinkToRespondMsgCC

Specifies (in the result value) the message for CC'd routees that overrides the **LinkToRespondMsg** result value.

0 = disable the message.

LinkToRespondTag

Specifies (in the result value) the anchor text for the URL to the Response Wizard. The default is **using this link**. This rule is ignored if **LinkToRespondFormat** = 0.

LinkToRespondTagCC

Specifies (in the result value) the anchor text for CC'd routees that overrides the **LinkToRespondTag** result value.

0 = disable the message.

LinkToSendFilesFormat

Specifies (in the result value) how the link to send files is placed in the outbound message. The default is **<p>{0} {1}.</p>**. where *{0}* is replaced by the **LinkToSendFilesMsg** text and *{1}* is replaced by the anchor tag, including the **LinkToSendFilesTag** text.

0 = disable the message.

LinkToSendFilesFormatCC

Specifies (in the result value) the format for CC'd routees that overrides the **LinkToSendFilesFormat** result value.

0 = disable the message.

LinkToSendFilesMsg

Specifies (in the result value) the message added to the bottom of an outbound email that provides the URL to send files. The default is **Send files to this document**. This rule is ignored if **LinkToSendFilesFormat** = 0.

LinkToSendFilesMsgCC

Specifies (in the result value) the message for CC'd routees that overrides the **LinkToSendFilesMsg** result value.

0 = disable the message.

LinkToSendFilesTag

Specifies (in the result value) the anchor text for the URL to send files. The default is **using this link**. This rule is ignored if **LinkToSendFilesFormat** = 0.

LinkToSendFilesTagCC

Specifies (in the result value) the text for CC'd routees that overrides the LinkToSendFilesTag result value.

0 = disable the message.

NotifyMsg

Specifies (in the result value) the content of the outbound notification message. This message is in plain text and intended to notify the recipient that there is a document for him/her in Spitfire's Inbox. The result value can include $$ placeholders, but not the [bookmark-style] placeholders. The default is "**$$PROJECT$$ $$DOCTYPE$$ $$TITLE$$ $$DOCNO$$ requires your attention**."

NotifySubject

Specifies (in the result value) the subject of the outbound notification message. This message is in plain text and intended to be brief.   The result value can include $$ placeholders, but not the [bookmark-style] placeholders. The default is "**Inbox Notification: $$PROJECT$$ $$TITLE$$ requires your attention**."

ReplyTip

Specifies (in the result value) the informative message at the bottom of an outbound email that instructs the recipient how to reply. The default is "**Your reply will be processed by the Spitfire workflow engine: see how to reply..**" The *$$ATCPopHelpLink$$* placeholder is replaced with the URL of the web page specified in ICTool.

0 = disable the message.

ReplyTipCC

Specifies (in the result value) the informative message for CC'd routees that overrides the **ReplyTip** result value. If specified, the $$ placeholder is replaced by the value of the standard ReplyTip.

0 = disable the message.

RequestReadReceipt

Specifies (in the result value) whether outbound emails for the corresponding Doc type should include the request for a read receipt from the user when the user first opens the email. If this feature is turned on, and the user acknowledges the email, the view date will be set on the recipient's route row in Spitfire. **Note**: this feature is not very reliable and only somewhat supported by email applications/services; therefore, no one should rely on the read receipt.

☐ (✗) = **0,** No (default).

☑ (✔) = **1,** Yes.

ResponseEchoTo

Specifies (in the result value) which field on the Notes tab on a document will be populated with the contents of the route Rsp field. (See also **EchoFormat**.)

0 = nothing will be copied to the document (default).

Note = the Rsp field will be copied to the top note field.

NoteA = the Rsp field will be copied to the middle note field.

NoteB = the Rsp field will be copied to the bottom note field tab.

NoteEML = the Rsp field will be copied to the message note field on the Message (Email) tab.

RoutedMsg

Specifies (in the result value) the message that will appear in the body of outbound e-mail. The default is **$$P.PROJECT$$ $$PROJECT$$ $$PROJECTNAME$$, $$DOCTYPE$$ #$$DOCNO$$: $$TITLE$$ has been $$SENTWHY$$ to you and requires your attention $$TO.DUE$$. \?$$REV.NOTEEML$$\? \?$$TO.REQUEST$$\?**

RoutedMsgCC

Specifies (in the result value) the message for CC'd routees that overrides the **RoutedMsg** result value.

RoutedMsgGroup

Specifies (in the result value) the message for Pending Any (grouped) routees that overrides the **RoutedMsg** result value.

RoutedSubject

Specifies (in the result value) the subject line for outbound e-mail. The result value cannot be more than 80 characters after resolving placeholders.

EnableManualCloseAtStatus

The EnableManualCloseAtStatus rule indicates the DocStatus code that allows users to manually close a document (of the specified Doc type) through the 📕 icon.

See also KBA-01441.

Note: anything that automatically closes the document, such as a workflow script or the **DocStatusIsClosed** rule (see page 65) takes precedence over this rule.

Filter Value

Any Doc type

The EnableManualCloseAtStatus rule accepts a Doc type (as defined in the Doc Types tool and appearing on the filter drop-down) as the filter value.

Result Value

Yes/No

The EnableManualCloseAtStatus rule accepts a blank ☐ or a checkmark ☑ as the result value.

☐ (✗) = **0,** do not display the 📕 icon that would allow manual close (default).

☑ (✔) = **1,** display the 📕 icon and allow manual close of the document.

Rules

Any DocStatus set

The EnableManualCloseAtStatus rule specifies (in the result value) any DocStatus code (from the Code Maintenance tool).

See the example on the next page.

Example

RULE MAINTENANCE				
GROUP:			☑ SHOW CODE SET	

	Rule Group	Filter Info	Type	Description
▲	EnableManualCloseAtStatus	DocTypeKey	Boolean	Lists the statuses at which the manual close UI should be enabled ?

RULE ENTRIES		
RULE NAME		DOC TYPE
☐ SITE ONLY		

	Rule	Filter Value	Result Value	SF
	A	Change Order	✓	✓

CODE SET					
SET NAME LIKE: DocStatus					

	Set Name	Set Type	Flag	Next Set	Size
▲	DocStatus	DocTyp Subcodes	Alert	✕	2

SET NAME	DocStatus	DESCR LIKE:	
CODE LIKE:		DOC TYPE	Change Order

Doc Type	Code	Description	Alert
Change Order	A	Approved	✕
Change Order	C	Canceled	✕

ExcludeCommonChoices

The ExcludeCommonChoices rule group indicates the code set plus Doc type combinations that exclude common choices/items from standard code set filters.

See also KBA-01023 and KBA-01077.

Filter Value

Any Doc type

The ExcludeCommonChoices rules accept a Doc type (as defined in the Doc Types tool and appearing on the filter drop-down) as the filter value.

Result Value

Yes/No

The ExcludeCommonChoices rule accepts a blank ☐ or a checkmark ☑ as the result value.

☐ (✕) = **0,** do not exclude common choices.

☑ (✓) = **1,** exclude common choices.

Rules

ComplianceList

Specifies (in the result value) whether to exclude common choices in the Compliance list (as defined in the Compliance Types tool).

DateList

Specifies (in the result value) whether to exclude common choices in the list of Date types (as defined in the Date Types tool).

DocReference

Specifies (in the result value) whether to exclude common choices in the list of References (as defined in the Reference tool).

Any code set

The ExcludeCommonChoices rule accepts any code set name (from the Code Maintenance tool).

Example

ExecutiveDashboard

The ExecutiveDashboard rule group defines computations for the Executive Dashboard grid. These are advanced rules. Computed fields might be used to display a value in a column, or the value might be a step in a larger calculation (see cmpNetCashDemand that uses cmpCashConversion, etc).

The rules for formulas are the same as those for the merge template's computed bookmarks. Relationships and aggregation are of limited use on the Executive Dashboard.

See also KBA-01227 for an example.

Filter Value

None

The ExecutiveDashboard rules do not use filter values.

Result Value

Formula

The ExecutiveDashboard rules accept a formula for the result value of all rules except ComputeList, which takes a list of computed values. Default formulas are listed in the chart on the next page. **Note**: there is a 196-character limit in the Result Value field. If your text is longer than 196 characters you will need to

- Split your text into smaller segments, each of any length up to 194 characters,

- Append **$+** to the end of each segment, except the last one,

- Add a rule row for each segment. These rules should have names that indicate they are a continuation of the first rule, for example, Introduction, Introduction.01, Introduction.02, etc.

Rules

ComputeList

Lists (in the result value) the names of the computed values. sfPMS reads this rule first. Each computed value must have a rule entry with the name of the computed value as the rule name and a formula as the result value.

Computed value name

Specifies (in the result value) the formula for each computed value on the Executive Dashboard grid.

Defaults

Test Value	Result Value
cmpActual	ISNULL(ex_act_amt,0)
cmpActualCommit	ISNULL(ex_act_amt,0) + ISNULL(ex_com_amt,0)
cmpAprvPR	ISNULL(ApprovedPRTotalAmount,0)
cmpBTD	ISNULL(BTD,0)
cmpCashConversion	TotalAR+Retention+IIF(cmpOverUnderBill > 0, cmpOverUnderBill,0)
cmpCashFunding	ISNULL(TotalAP,0) + ISNULL(APRetention,0) + IIF(cmpOverUnderBill < 0, -1.0 * cmpOverUnderBill,0)
cmpCCO	ISNULL(ApprovedSCAmount,0)
cmpContract	ISNULL(rv_Contract,0)
cmpCORev	ISNULL(ApprovedCO,0)
cmpCurrCommit	cmpOrigCommit + cmpCCO
cmpEarnedIncome	IIF(cmpExEAC <= 0, 0, (cmpContract * IIF(cmpActual > cmpExEAC, 1, (cmpActual / cmpExEAC))))
cmpEstimatedProfit	ISNULL(rv_contract,0) - ISNULL(ex_eac_amt,0)
cmpExEAC	ISNULL(ex_eac_amt,0)
cmpExFAC	ex_fac_amt
cmpEXOrig	ex_bud_amt
cmpFutureProfit	ISNULL(rv_Contract,0) - ISNULL(ex_eac_amt,0) - ISNULL(cmpEarnedIncome,0)
cmpNetCash	(BTD - (TotalAR + Retention)) - (ISNULL(TotalCost,0) - (ISNULL(TotalAP,0) + ISNULL(APRetention,0)) + IIF(ISNULL(ex_act_amt,0) - ISNULL(TotalCost,0) > 0,ISNULL(ex_act_amt,0) - ISNULL(TotalCost,0),0))
cmpNetCashDemand	cmpCashConversion – cmpCashFunding
cmpOrigCommit	ISNULL(OriginalSCAmount,0)
cmpOrigContract	ISNULL(rv_Contract,0) - ISNULL(ApprovedCO,0)
cmpOverUnderBill	-1.0 * (ISNULL(BTD,0) - ISNULL(cmpEarnedIncome,0))
cmpPerComplete	((cmpActualCommit) / IIF((ISNULL(ex_eac_amt,0)) = 0,1,(ISNULL(ex_eac_amt,0))))
cmpRvEAC	rv_eac_amt
cmpUCO	rv_ppco_amt

FileCatalogConfig

The FileCatalogConfig rule group controls various optional behaviors for uploading files into the Spitfire Catalog.

See also KBA-01265.

Filter Value

Any Doc type

The FileCatalogConfig rules accept a Doc type (as defined in the Doc Types tool and appearing on the filter drop-down) as the filter value.

Result Value

Varies

Result values for the FileCatalogConfig rules depend on the rule and are indicated within the description of each rule.

Rules

ApproveWithDoc

Specifies (in the result value) whether all unapproved files attached to a document should be automatically approved when the document is approved. This rule is irrelevant if AutoApproveVersion = ✓ (see below).

☐ (✗) = **0,** No.

☑ (✓) = **1,** Yes (default for Catalog File Route Doc type).

AttachMode

Specifies (in the result value) the default MailRoute code for the attachment include flag.

0 = Not Sent

1 = Native

M = Assembled

P = PDF

AttachMode:*ext*

Specifies (in the result value) the default MailRoute code for the attachment include flag for files with the indicated extension.

0 = Not Sent

1 = Native

M = Assembled

P = PDF

AutoApproveVersion

Specifies (in the result value) whether files should be automatically approved when they are first uploaded. The Doc type filter value only applies when the file is attached to a document.

☐ (✕) = **0,** No.

☑ (✓) = **1,** Yes (default).

Note: if AutoApproveVersion = 0, new files need approval before they can be viewed from the document's attachment tab or from the Project Dashboard. A user with **S**(pecial) permission on the **PART | Catalog File Version History** capability can approve the file at any time. In addition, a user with Approver permission for a Catalog File Route document with this file can approve the file.

AutoCheckin

Specifies (in the result value) whether files should be automatically checked in when a new version of the file is uploaded.

☐ (✕) = **0,** No.

☑ (✓) = **1,** Yes (default).

CopyMarkupsOnCheckin

Specifies (in the result value) whether all AutoVue (jVue) markups on a file should be copied onto the new version of the file being checked in. The original markups will remain on the prior versions.

☐ (✕) = **0,** No (default). Markups are not copied, but remain only on the versions on which they were added.

☑ (✓) = **1,** Yes.

DefaultFolder

Specifies (in the result value) the folder path (starting with **/**) where the Add Files tool and inbound email should place new files by default. The result value accepts any folder path. For example, if you want Commitment files placed in your Legal folder, you would use **/Legal** for the Commitment Doc type, and if you want Submittal files in the Specification subfolder of the Construction folder, you would use **/Construction/Specification** for the Submittal Doc type.

DefaultFolder:*subtype*

Specifies (in the result value) the folder path (starting with /) where the Add Files tool and inbound email should place new files for documents of the specified subtype. *subtype* can be any SubType code as defined in the Code Maintenance tool. The result value accepts any folder path.

HardCopyFolder

(*Made obsolete in V4.2*)

HardCopyFolder:*xx*

(*Made obsolete in V4.2*)

InboundEmail:*ext*

Specifies (in the result value) how email attachments of the indicated file type are to be catalogued. Use **:eml** as the file type to indicate the email file itself.

0 = ignore the files (i.e., do not place in Catalog nor attach them to a document).

1 = accept the files, place them in the Catalog and attach them to a document.

2 = accept the email (.eml) file itself if the .eml file has no eligible attachments.

3 – **128** = the minimum size of files to be accepted.

SetContactWithDoc

Specifies (in the result value) the contact to be set to the approving user on all attached files when a document is approved. The new value replaces any prior value. This rule requires that SetReferenceDateWithDoc (below) be set to the same filter Doc type.

AltFileContact = the Internal person (seen on the file's File Properties)

SourceContact = the Source Contact person (seen on the file's File Properties).

SetReferenceDateWithDoc

Specifies (in the result value) whether all files attached to a document should have their reference date set to the document's approval date when that document is approved. The new value replaces any prior value.

☐ (✕) = **0,** No.

☑ (✔) = **1,** Yes.

TemplateAttachEdit*

Specifies (in the result value) whether the Edit Now checkbox should be checked by default when you use the Attach from Template option ().

☐ (✕) = **0,** No.

☑ (✔) = **1,** Yes (default).

TemplateAttachMode

Specifies (in the result value) the default MailRoute code for the attachment include flag for files created from attachment templates. **Note**: This rule and the source template type replace the older **DocTypeConfig | XmitBody** rule.

0 = Not Sent.

1 = Native.

M = Assembled.

P = PDF.

TemplateAttachPrefix

Specifies (in the result value) the prefix for filenames when creating files from attachment templates. The default is **Project,** which inserts the masked project ID (e.g., GC-003). There are no other possible result values at this time other than the following:

0 = no prefix.

TemplateAttachSuffix

Specifies (in the result value) the suffix for filenames when creating files from attachment templates. The default is **#,** which adds the document number as the suffix. There are no other possible result values at this other than the following:

0 = no suffix.

UploadChunkKB*

Specifies (in the result value) the number of KB to be uploaded at a time by the JQ upload tool. The number specified is rounded up to an even multiple of 8. Actual data sent will be a multiple of 8040. The default is 112. **Note**: this is an advanced rule for IT tuning.

FileTypeConfig

The FileTypeConfig rule group controls various optional behavior and handling of files.

See also KBA-01439.

Filter Value

Any File type

The FileTypeConfig rules accept any file type (as indicated by filename extension) as the filter value.

Result Value

Varies

Result values for the FileTypeConfig rules depend on the rule and are indicated within the description of each rule.

Rules

AliasTo

Specifies (in the result value) the already configured file type whose configuration should be used to automatically configure the filter file type. This rule thus saves you from setting up the following rules for similar file types.

EditIcon

Specifies (in the result value) the image that will appear for files of the indicated type that will allow editing of the file, if the user has appropriate native editing software and permission to edit.   The result value accepts any filename with an image extension (e.g.,**.word.png**). This icon file must be in the web application images folder on the IIS server. The result value also accepts the following:

0 = disable editing for the file type indicated in the filter value.

RULE MAINTENANCE				
GROUP:			☐ SHOW CODE SET	
Rule Group	Filter Info	Type	Description	
FileTypeConfig	String	String	Allows customization of catalog options based u...	
RULE ENTRIES				
RULE NAME	Edit ✕		☐ SITE ONLY	
	Rule	Filter Value	Result Value	
	EditIcon		0	
	EditIcon	doc	wordlink.png	
	EditIcon	docx	wordlink.png	

FILES			
Cataloged	Ref Date	Name	
10/7/2006		AcmeMeeting.doc	

JavaViewer

Specifies (in the result value) whether the Java Viewer (the Spitfire Viewer in AutoVue) should be enabled for the file type.

☐ (✕) = **0,** No.

☑ (✓) = **1,** Yes (default).

ViewIcon

Specifies (in the result value) the image that will appear for files of the indicated type that will allow viewing of the file, if the user has appropriate native editing software and permission to edit.   The result value accepts any filename with image extension (e.g., **word.png**). This icon file must be in the web application images folder on the IIS server. The result value also accepts the following:

0 = disable viewing of the file type indicated in the filter value.

ViewIcon:Generic

Specifies (in the result value) the image that will appear for files of the indicated type on mobile devices and browser-window dashboards, allowing viewing of the file. The result value accepts any filename with an image extension (e.g., **worklink.png**). This file must be in the web application images folder on the IIS server. The default for this rule is the result value for the ViewIcon rule.

0 = disable viewing of the file type indicated in the filter value.

E = use the result value configured for the EditIcon rule.

ViewViaHTML

Specifies (in the result value) the HTML that should be rendered to offer the file type for viewing. See KBA-01064. There is no default. Specifying a value for this rule overrides the **JavaViewer** rule.

VVHAutoOpen

Specifies (in the result value) whether HTML-viewed files should be opened automatically using javascript. This rule is ignored if the **ViewViaHTML** rule is not specified.

☐ (✕) = **0,** No (default).

☑ (✓) = **1,** Yes.

ItemBudgetRevenue

The ItemBudgetRevenue rule group controls the revenue entry on the Budget Entry for a Change Item. The rules are the codes for the TaskCodeType code set (as defined in the Code Maintenance tool).

See also KBA-01189.

Filter Value

None
The ItemBudgetRevenue rules do not use filter values.

Result Value

Auto/Manual/Disabled
The ItemBudgetRevenue rules accept the following as result values.

Auto = revenue is calculated using the markup rule (default).

Manual = revenue can be entered manually, but is assumed to be zero.

Disabled = revenue is prohibited, always zero.

Rules

AA
Specifies (in the result value) how revenue will be handled on an auto allocated entry.

RQ
Specifies (in the result value) how revenue will be handled on the RFQ entry.

RR
Specifies (in the result value) how revenue will be handled on the Revenue entry.
Note: it is usually a bad idea to disable revenue on this entry!

SG
Specifies (in the result value) how revenue will be handled on the CCO entry.

SN
Specifies (in the result value) how revenue will be handled on the Commitment entry.

SP
Specifies (in the result value) how revenue will be handled on the Self Perform entry.

ItemCodeLike

The ItemCodeLike rule group indicates the code set plus Doc type combinations that limit the choices on a second code set.

See also KBA-01077.

Filter Value

Any Doc type

The ItemCodeLike rules take any Doc type (as defined in the Doc Types tool and appearing on the filter drop-down) as the filter value.

Result Value

Any code set

The ItemCodeLike rules accepts any code set (as defined in the Code Maintenance tool).

Rules

Any code set

The ItemCodeLike rules accepts any code set (as defined in the Code Maintenance tool).

See the example on the next page.

Example

LienWaiverTemplate

The LienWaiverTemplate rule group controls the lien waiver printout (Microsoft Word file) that is applied when a Commitment/Subcontract is Committed.   The hierarch of specific rules is Project, Customer, Vendor, common.

Note: this feature uses Microsoft Dynamics SL integration to print the lien waivers.

See also KBA-01184.

Filter Value

Any Vendor ID
The LienWaiverTemplate rules accept a Vendor ID as the filter value.

Result Value

Path and Filename
The LienWaiverTemplate rules accept the full path of the Microsoft Word lien waiver file as the result value.

Rules

CustomerFinal:*CustID*
Indicates (in the result value) that the Customer specified through the Customer ID is to get the specified printout for final lien waivers. This rule overrides the generic **Final** lien waiver.

CustomerInterim:*CustID*
Indicates (in the result value) that the Customer specified through the Customer ID is to get the specified printout for interim lien waivers. This rule overrides the generic **Interim** lien waiver.

Final
Specifies (in the result value) the generic final lien waiver printout.

Interim
Specifies (in the result value) the generic interim lien waiver printout.

ProjectFinal:*ProjectID*
Indicates (in the result value) that any Commitment/Subcontract in the project specified through the Project ID is to get the specified printout for final lien waivers. This rule overrides generic and customer final lien waivers.

ProjectInterim:*ProjectID*
Indicates (in the result value) that any Commitment/Subcontract in the project specified through the Project ID is to get the specified printout for interim lien waivers. This test value overrides generic and customer interim lien waivers.

NextDocFlow

The NextDocFlow rule group customizes how the system responds to the Create Next command on the Document Options drop-down menu.

See also KBA-01517.

Filter Value

Any Doc type

The NextDocFlow rules take any Doc type (as defined in the Doc Types tool and appearing on the filter drop-down) as the filter value. This Doc type represents the source Doc type used to create the new document.

Result Value

Varies

Result values for the NextDocFlow rules depend on the rule and are indicated within the description of each rule.

Rules

AttachmentFilter

Specifies (in the result value) which attachments should be copied from the source document to the new document. The result value accepts a Boolean expression that references fields in the result set of f_DocAttachments, its parents and its children. For example:

False = copy no attachments (default).

True = copy all attachments.

AttachedDocMaster is NULL = copy only attached files, not documents

AttachedItemNumber is NULL = copy only attachments not associated with Items.

AttachedItemNumber is NOT NULL = copy only attachments associated with Items.

DocKey is NOT NULL = copy only attached files, not documents.

FileType = 'PDF' = copy only attached PDF files.

DocNoSuffixLen

Specifies (in the result value) the number of characters to be used to create a revision suffix on the base document number (DocNo). If the Doc type has a defined mask and the suffix length matches the last segment length, then the last segment is used. Otherwise, a dash and revision number are added. The default is **0** (meaning no revision number is calculated). The maximum is 9.

FieldList*

Specifies (in the result value) the semicolon-separated list of field names to be copied from the source document to the target document near the end of the creation workflow. There is no default. The syntax is *targetable.field = sourcetable.field.* When *sourcetable* is omitted, the document header is assumed. When *targettable* is omitted, the source table is assumed. Null source values are ignored. Other possible tables are DocRevision and DocRoute (for first route only).

IncExclFilter

Specifies (in the result value) which inclusion and exclusion entries should be copied from the source document to the new document. The result value accepts a Boolean expression that references fields in the xsfInclusion table, its parents and its children. For example:

False = copy no inclusion/exclusion entries.

True = copy all inclusion/exclusion entries (default).

ItemFilter

Specifies (in the result value) which Items should be copied from the source document to the new document. The result value accepts a Boolean expression that references fields in the xsfDocItem table, its parents and its children. For example:

False = copy no Items.

True = copy all Items (default).

ItemStatus not in ($$ItemStatusList) = copy all Items without the indicated Item status.

ItemStatus in ($$ItemStatusList) = copy all Items with the indicated Item status.

Billable = copy all Items marked as Billable.

ItemStatusIn

Specifies (in the result value) the rule used to enumerate Item status codes. The enumerated codes are used to replace *$$ItemStatusList* in the **ItemFiler** rule (see above). If the **ItemFilter** rule does not contain *$$ItemStatus*, this rule has no effect.

DocItemStatusIsApproved = the Item statuses enumerated in this rule. See page 57.

DocItemStatusIsClosed = the Item statuses enumerated in this rule (default). See page 59.

LikeFromType

Specifies (in the result value) the Doc type that is a model for the filter Doc type. This rule is useful when you have a custom Doc type that you want to behave like a standard Doc type. For example:

Submittal = preserves Item numbers like the Submittal Doc type.

RFQ = renumbers Items and sets Quote Amount of new Items based on the Expense Amount of the source document like the RFQ Doc type.

LinkDocs*

Specifies (in the result value) whether the original and new documents should be linked.

☐ (✕) = **0,** No (default).

☑ (✔) = **1,** Yes.

MenuText

Specifies (in the result value) the text that appears in the Document Options drop-down menu. The default is **Create _$$_** where _$$_ is the site name of the target Doc type, as specified in the **TargetType** rule.

RunScript*

Specifies (in the result value) the name of the workflow script (from the Workflow library) to be run after the initial save of the target document and in the context of the target document. The default is not to run any script. **Note**: include an ATC: SAVE command in the workflow script.

RunScriptOnSource*

Specifies (in the result value) the name of the workflow script (from the Workflow library) to be run after the initial save of the target document, but in the context of the source document. (The script will have no access to the new document other than through qAlias bookmarks.) The default is not to run any script. **Note**: include an ATC: SAVE command in the workflow script.

SourceDocStateFlags

Specifies (in the result value) the document states during which the Create Next option is enabled. Possible result values can be combined.

002 = In Process.

004 = Pending.

032 = Closed.

064 = Approved (default for most Doc types).

102 = All of the above: 64+32+4+2 (default for Submittals, RFIs and Commitments)

TargetType

Specifies (in the result value) the Doc type that is created by a Create Next option on the source document. The default is none.
Note: Submittal, Submittal Package, RFI, Potential CO, Change Order, Commitment, Bid Package and RFQ do not require this rule for their legacy target document types (described in the _Focus on Doc Types and Project Workflow_ guide) but the target type can be overridden by this rule.

NextDocStatus

The NextDocStatus rule group specifies which status codes can be chosen next for a given status code plus Doc type combination.

Warning: It is critical that the rule always be included as a 'next status' – otherwise the document will automatically change to the alphabetically first status description in the result value list. While this capability could be a feature, more likely it would be confusing.

See also KBA-01118.

Filter Value

Any Doc type

The NextDocStatus rules accept a Doc type (as defined in the Doc Types tool and appearing on the filter drop-down) as the filter value.

Result Value

List of DocStatus codes

The NextDocStatus rules accept one of the following as the result value.

- A list of applicable DocStatus codes (as defined in the Code Maintenance tool), each in single quotation marks, separated by commas, for example, **'I','A','M','V'**

- The word **not:** followed by a list of applicable DocStatus codes, each in single quotation marks, separated by commas, for example, **not:'A','M','V'**

Rules

NewDoc*

Specifies (in the result value) the codes to be available for new documents.

Any DocStatus code

The NextDocType rules accept any DocStatus code (as defined in the Code Maintenance tool).

See the example on the next page.

TIP
A Next Doc Status Matrix report is available on the Admin folder. See the *Spitfire Reports* technical white paper.

Example

RULE MAINTENANCE				
GROUP:			☑ SHOW CODE SET	

	Rule Group	Filter Info	Type	Description
▲	NextDocStatus	DocTypeKey	String	For a given Status code and Doc Type, returns the valid status codes that can be chosen next. ?

RULE ENTRIES		
RULE NAME	DOC TYPE	Pay Application
☐ SITE ONLY		

	Rule	Filter Value	Result Value	SF
	A	Pay Application	'A','V'	✓
	C	Pay Application	'C','I'	✓
	I	Pay Application	'I','P','C'	✓
	NewDoc	Pay Application	'I'	✓
	V	Pay Application	'A','V'	✓

CODE SET	
SET NAME LIKE: DocStatus	

	Set Name	Set Type		Flag	Next Set	Size
▲	DocStatus	DocTypeSubcodes		Alert	✕	2

SET NAME	DocStatus	DESCR LIKE:	
CODE LIKE:		DOC TYPE	Pay Application

Doc Type	Code	Description	Alert
Pay Application	A	Completed	✕
Pay Application	C	Canceled	✕
Pay Application	I	In Process	✕
Pay Application	M	Printed	✕
Pay Application	P	Draft	✕
Pay Application	V	Invoiced	✕

PostExpensesAtStatus

The PostExpensesAtStatus rule group configures the system to automatically post Budget Revisions for Change Order expenses, based upon document status changes.

See also KBA-01440.

Filter Value

Change Order

The PostExpensesAtStatus rules takes a Doc type (as defined in the Doc Types tool and appearing on the filter drop-down) as the filter value. Currently, only the **Change Order** Doc type is supported.

Result Value

Yes/No

The PostExpensesAtStatus rules accept a blank ☐ or a checkmark ☑ as the result value.

☐ (✗) = **0,** No. No posting of the expenses should occur when the document is saved with the corresponding status (default).

☑ (✓) = **1,** Yes. Post expenses when the document is saved with the corresponding status.

Rules

Any DocStatus code

The PostExpensesAtStatus rules accepts any DocStatus code (from the Code Maintenance tool).

Example

PostRevenueAtStatus

The PostRevenueAtStatus rule group configures the system to automatically post Budget Revisions for Change Order revenue, based upon document status changes.

See also KBA-01440.

Filter Value

Change Order

The PostRevenueAtStatus rules take a Doc type (as defined in the Doc Types tool and appearing on the filter drop-down) as the filter value. Currently, only the Change Order Doc type is supported.

Result Value

Yes/No

The PostRevenueAtStatus rules accept a blank ☐ or a checkmark ☑ as the result value.

☐ (✕) = **0,** No (default). No posting of the revenue will occur when the document is saved with the corresponding status.

☑ (✔) = **1,** Yes. Revenue is posted when the document is saved with the corresponding status.

Rules

Any DocStatus code

The PostRevenueAtStatus rules accept any DocStatus code (from the Code Maintenance tool).

Example

PresetSearch

The PresetSearch rule group defines preset Catalog searches for use in the system, after you create a new custom tab adding XML code to your SiteConfig.xml file.

See KBA-01564.

Filter Value

Query parameter ID

The PresetSearch rules take an ID (as defined through the **?set=id** page query parameter) as the filter value.

Result Value

Varies

Result values for the PresetSearch rules depend on the rule and are indicated within the description of each rule.

Rules

AutoSearch

Specifies (in the result value) whether the search should be performed immediately and each time the filters are changed.

☐ (✕) = **0,** No (default).

☑ (✓) = **1,** Yes.

Closed

Specifies (in the result value) whether closed documents should be included in the search results.

☐ (✕) = **0,** No (default).

☑ (✓) = **1,** Yes.

DaysAgo

Specifies (in the result value) the number of days prior to today to include in the search results. Default is 366. If you specify a number greater than 20,000,101, the number is interpreted as YYYYMMDD.

DocType

Specifies (in the result value) the Doc type by which to limit the search results.

Documents

Specifies (in the result value) whether documents should be included in the search results.

☐ (✕) = **0,** No (default).

☑ (✓) = **1,** Yes.

FileName

Specifies (in the result value) a mask for filenames to limit search results.

Files

Specifies (in the result value) whether files should be included in the search results.

☐ (✗) = **0,** No (default).

☑ (✓) = **1,** Yes.

Folder

Specifies (in the result value) the folder (if any) whose files should be included in the search results. Paths must begin with a slash **/**.

Lock

Specifies (in the result value) a semicolon-separated list of locked filters that are not presented to the user. Locking a filter prevents users from expanding or changing the search. Possible locked filters include:

AutoSearch = hide the **Auto Refresh** checkbox.

Closed = hide the **Include Closed** checkbox.

DocAttrType = hide the **Has Attribute** checkbox.

DocAttrValue = hide the Attribute **Value** drop-down.

DocDate = hide the **Date** fields.

DocNo = hide the **Doc #** field.

DocStatus = hide the **Status** drop-down.

DocType = hide the **Type** drop-down.

Documents = hide the **Include Documents** checkbox.

Due = hide the **Due** date fields.

Files = hide the **Include Files** checkbox.

HasAttachments = hide the **Has Files** drop-down.

IsCompanyMode = hide the **Company Wide** checkbox.

IsSubcontractor = hide the **Project Purchasing** checkbox.

MaxItems = hide the **Max Items** field.

PerPage = hide the **Per Page** field.

Project = hide the **Project ID** lookup field.

Reference = hide the **Reference** lookup field.

ReferenceDate = hide the **Ref Date** fields.

ResponsibleParty = hide the **Responsible** lookup field.

Search = hide the **Text** field.

SearchNow = hide the **Search** button.

SourceCompany = hide the **Company** field.

SourceContact = hide the **Contact** lookup field.

SourceDocNo = hide the **Source #** field.

SourceScope = hide the **Scope** drop-down.

Subcontract = hide the **Commitment** field.

SubType = hide the **Subtype** drop-down.

Task = hide the **Cost Code** field.

MaxItems

Specifies (in the result value) the maximum number of search results to be displayed.

PageTitle

Specifies (in the result value) the text that appears in the header at the top of the page.

Preview

Specifies (in the result value) whether files included in the search results may include a preview.

☐ (✗) = **0,** No (default).

☑ (✔) = **1,** Yes.

Project

Specifies (in the result value) a project ID or mask to limit search results.

ShowFileKeywords

Specifies (in the result value) whether file results should include the keyword/notes column.

☐ (✗) = **0,** No (default).

☑ (✔) = **1,** Yes.

SortDocs*

Specifies (in the result value) the column(s) by which to sort document results. Use DESC to indicate a descending sort. Multiple column names should be separated by a comma. The default is **DocDate DESC, Title**. Possible column names are:

- **DocDate**
- **Due**
- **Title**
- DocTypeKey (groups rather than alphabetizes)
- DocNo
- Project

- ProjectName

- DocReference (groups rather than alphabetizes)

- FromUser

- SourceContact (groups rather than alphabetizes)

- StatusText

SortFiles*

Specifies (in the result value) the columns(s) by which to sort file results. Use DESC to indicate a descending sort. Multiple column names should be separated by a comma. The default is **FileName**. Possible column names are:

- Cataloged

- ReferenceDate

- FileName

- Project

- ProjectName

- SourceContact (groups rather than alphabetizes)

- Keyword

TreeView

Specifies (in the result value) whether the folder tree should be displayed to the left of the file results.

☐ (✕) = **0,** No).

☑ (✔) = **1,** Yes (default).

WithAttachedFile

Specifies (in the result value) the GUID key of a file so that only documents with this file attached will appear in the search results.

PrivateContact

The PrivateContact rule group specifies which groups of Contacts should be made private by default and not show up on lookups.

See also KBA-01116.

Filter Value

None

The PrivateContact rules do not use filter values.

Result Value

Yes/No

The PrivateContact rules accept a blank ☐ or a checkmark ☑ as the result value.

☐ (✕) = **0,** No. The Contact is not private.

☑ (✓) = **1,** Yes. The Contact is private by default.

Rules

Customer

Specifies (in the result value) whether Customer Contacts imported from Microsoft Dynamics SL should be made private.

Default

Specifies (in the result value) whether Contacts created through the Manage Dashboard should be made private.

Employee

Specifies (in the result value) whether Employee Contacts imported from Microsoft Dynamics SL should be made private.

Vendor

Specifies (in the result value) Vendor Contacts imported from Microsoft Dynamics SL.

ProjectCAFormulas

The ProjectCAFormulas rule group defines computations for the Cost Analysis part of the Project Dashboard. These are advanced rules. Computed fields might be used to display a value in a column, or the value might be a step in a larger calculation.   The rules for formulas are the same as those for the merge templates computed bookmarks. Relationships and aggregation are of limited use on the Executive Dashboard.

See also KBA-01285.

Filter Value

None

The ProjectCAFormulas rules do not use filter values.

Result Value

Formula

All ProjectCAFormulas rules accept a formula for the result value except ComputeList, which takes a list of computed value names. Default formulas are listed in the charts below. **Note**: there is a 196-character limit in the Result Value field. If your text is longer than 196 characters you will need to

- Split your text into smaller segments, each of any length up to 194 characters,

- Append **$+** to the end of each segment, except the last one,

- Add a test value row for each segment. These test values should have names that indicate they are a continuation of the first test value, for example, Introduction, Introduction.01, Introduction.02, etc.

Rules

ComputeList

Lists the names of the computed values. sfPMS reads this rule first. Each computed value must have a rule entry with the name of the computed value as the rule name and a formula as the result value.

FooterList

Lists the names of the computed total values at the bottom of the grid. Each computed value must have a rule entry with the name of the computed value as the rule name and a formula as the result value.

Computed value name

Indicates the formula for each computed value on the Cost Analysis part.

	EAC	U.CO	=Sum	Actual	Com Cost
REVENUE	cmpRevisedBud	cmpPendingPCO	cmpEACPPCO	cmpProjectActual	cmpCommit
Footer:Revenue	cmpTotalRevenueRevBud	cmpTotalRevenuePPCO	cmpTotalRevenueEACPPCO	cmpTotalRevenueActual	cmpTotalRevenueCommit
Footer:Expense	cmpTotalExpenseRevBud	cmpTotalExpensePPCO	cmpTotalExpenseEACPPCO	cmpTotalExpenseActual	cmpTotalExpenseCommit
Footer:Margin	cmpTotalMarginRevBud	cmpTotalMarginPPCO	cmpTotalMarginEACPPCO	cmpTotalMarginActual	cmpTotalMarginCommit

	=A+C	Spent	ETC	FAC	Variance
REVENUE	cmpProjectActualCommit	cmpSpent	cmpToComplete	cmpCurrentForecast	cmpVariance
Footer: Revenue	cmpTotalRevenueActualCommit	cmpTotalRevenueSpent	cmpTotalRevenueToComplete	cmpTotalRevenueCurForecast	cmpTotalRevenueVariance
Footer:Expense	cmpTotalExpenseActualCommit	cmpTotalExpenseSpent	cmpTotalExpenseToComplete	cmpTotalExpenseCurForecast	cmpTotalExpenseVariance
Footer:Margin	cmpTotalMarginActualCommit	cmpTotalMarginSpent	cmpTotalMarginToComplete	cmpTotalMarginCurForecast	cmpTotalMarginVariance

ProjectConfig

The ProjectConfig rule group specifies options and characteristics for projects.

See also KBA-01153.

Filter Value

Any SubType code

The ProjectConfig rules accept a SubType code (as defined in the Code Maintenance tool) as the filter value, except where noted.

Result Value

Varies

Result values for the ProjectConfig rules depend on the rule and are indicated within the description of each rule.

Rules

AllocationMethod

Specifies (in the result value) the default for PJPROJ.Alloc_Method_Cd. The result value accepts a Microsoft Dynamics SL allocation method code.

AllocationRateTable

Specifies (in the result value) the default for PJPROJ.Rate_Table_ID. The result value accepts a Microsoft Dynamics SL allocation rate table ID.

AllowNoCustomer

Specifies (in the result value) whether a project (Project Setup document) can be created without a customer.

☐ (✗) = **0,** No (default).

☑ (✔) = **1,** Yes.

AllowNoItems

Specifies (in the result value) whether a project (Project Setup document) can be created without any Items.

☐ (✗) = **0,** No (default).

☑ (✔) = **1,** Yes.

BidBudget

Specifies (in the result value) whether a budget document should be created for the Bid document on the project.

☐ (✗) = **0,** (default).

☑ (✔) = **1,** Yes.

BillingApprover

Specifies (in the result value) the default for PJBILL.approver. The result value accepts a Microsoft Dynamics SL project employee ID.

BillingCopies

Specifies (in the result value) the default for PJBILL.Copy_Num. The result value accepts a number. The internal default is **2**.

BillingRule

Specifies (in the result value) the default for PJBILL.Bill_Type_Cd. The result value accepts a Microsoft Dynamics SL billing rule code.

BillingType

Specifies (in the result value) the default for PJBILL.pb_id20. The result value accepts a Microsoft Dynamics SL billing code. The internal default is **S** for Standard.

BTMapFrom

Specifies (in the result value) the field that should be used for advanced mapping in the . Use **BTMapLen** and **BTMapStart** to extract data for this advanced mapping value.

CUSTOMERID = customer IDs

DIVISIONID = Company Division IDs

PROJECT = Project IDs

BTMapLen

Indicates (in the result value) the number of characters to extract.

BTMapStart

Indicates (in the result value) the starting position in the 'map from' value. This rule must be specified for Project Team mapping to work correctly.

1 = first character

2 = second character, etc.

BuildTeam

Specifies (in the result value) the Contacts that should be added to the project team. The result value provides the list of Contacts, each value separated by a comma (for example, **User,Primary,To**). The possible list is as follows:

- **User** – the current user saving the document.
- **Primary** – the primary customer (source) contact.
- **Responsible** – the responsible party.
- **To** – the Contact on the To address.
- **From** – the Contact on the From address.
- **Approver** – the Contact down as the Owner Approver

In each case, the corresponding Contact's default responsibility is used on the team.

COContractLine

Specifies (in the result value) the Project Setup line description to which Change Items should link.

CommitmentBudgeting*

Specifies (in the result value) the control value of xsfProject.SCBudgetMode and what appears by default on the Commitment Budgeting Mode field on the Project Setup's Project tab. (See the **InitialTargets** and **UpdateTargets** rules.) A Subtype code (as defined in the Code Maintenance tool) can be used as the filter value.

A = the project starts out in Initial mode and is automatically advanced to Update mode when the first CO or CCO document is created.

I = The project is in Initial Commitment Budgeting mode.

N = CommitmentBudgeting is turned off.

U = The project is in Update Commitment Budgeting mode.

ContractCostCode

Specifies (in the result value) the first cost code for the work-breakdown-structure. The result value takes the format *cost code;description*. For integrated sites, the result value also becomes the first entry for PJPENT. The new cost code receives the Contract Value when the Project Setup is 'committed'.

ContractDashboardLink

Specifies (in the result value) whether a link to the Project Setup/Contract document should be added to the Document Menu on the Project Dashboard.

☐ (✕) = **0,** No (default).

☑ (✓) = **1,** Yes.

ContractType

Maps the Spitfire SubType (defined in the Code Maintenance tool and used as a filter value) to a Microsoft Dynamics SL contract type code for PJPROJ.contract_type.

DashboardTitle

Specifies (in the result value) the text for the Project Dashboard title bar. Text can include **{0}** to be replaced by Project ID; **{1}** to be replaced by project name and **{2}** to be replaced by project status.

DashboardTitle:*status*

Specifies (in the result value) the text for the Project Dashboard title bar for projects of the specified status. *status* can be any DocStatus code for Project Setup documents as defined in the Code Maintenance tool. Text can include {0} to be replaced by Project ID; {1} to be replaced by project name and {2} to be replaced by project status. This rule overrides the DashboardTitle rule.

ExcludedParts:*type*

Specifies (in the result value) the semicolon-separated list of parts that should be excluded from the dashboard for all users for projects of the specified type. *type* can be **D** (for Data), **E** (for Equipment) or **P** (for Standard).

ProjWeather = the Conditions part.

ProjTeam = the Team Contacts part.

ProjPhoto = the Photo part.

ProjNote =the Remarks part.

ProjectKPI = the Key Performance Indicators part.

ProjectCA = the Cost Analysis part.

GLSAMapBFrom

Specifies (in the result value) the source of the secondary mapping of the GL Subaccount for a given project subtype. This rule is ignored if **GLSAMapFrom** is blank. Use the **GLSAMapBLen** and **GLSAMapBStart** rules to extract data for this secondary mapping value.

COMPANYID = Company ID.

CUSTOMERID = Customer ID.

PROJECT = Project.

GLSAMapBLen

Specifies (in the result value) the number of characters in the **GLSAMapBFrom** value to be used in mapping the GL Subaccount. The result value can be any number.

GLSAMapBRaw

Specifies (in the result value) whether the extracted secondary mapping value should be used as the GL Subaccount.

☐ (✕) = **0,** No, use the GLSAMapping entry to continue the mapping.

☑ (✔) = **1,** Yes.

GLSAMapBStart

Specifies (in the result value) the starting position in the **GLSAMapBFrom** value. The result value can be any number (1 = first character, 2 = second character, etc.).

GLSAMapFrom

Specifies (in the result value) the field that should be used for advanced mapping of the GL Subaccount for a given project subtype. Use the **GLSAMapLen** and **GLSAMapStart** rules to extract data for this advanced mapping value.

COMPANYID = Company ID.

CUSTOMERID = Customer ID.

PROJECT = Project.

TIP
See KBA-01302 for an example of GL Subaccount mapping.

GLSAMapLen

Specifies (in the result value) the number of characters in the **GLSAMapFrom** value to be used in mapping the GL Subaccount. The result value can be any number.

GLSAMapping

Specifies (in the result value) that the extracted mapping should be used as the filter value and the result value as the new GL Subaccount. The result value accepts any combination of letters and numbers.

GLSAMapRaw

Specifies (in the result value) whether the extracted mapping value should be used as the GL Subaccount.

☐ (✕) = **0,** No, use the GLSAMapping entry to continue the mapping.

☑ (✓) = **1,** Yes.

GLSAMapStart

Specifies (in the result value) the starting position in the **GLSAMapFrom** value. The result value can be any number (1 = first character, 2 = second character, etc.). This rule must be specified in order for mapping of the GL Subaccount to work correctly.

GLSubaccount

Specifies (in the result value) the default for PJPROJ.GL_SubAct in Microsoft Dynamics SL. The result value accepts any GL Subaccount number to be used for the Project.

InvoiceFormat

Specifies (in the result value) the default for PJBILL.inv_format_cd. The result value accepts a Microsoft Dynamics SL invoice format code.

InvoiceTextMap

Specifies (in the result value) which Project Setup note to copy to PJINVTXT in Microsoft Dynamics SL.

Note = copy the first note field from the document's Notes/Scope tab.

NoteA = copy the second note field from the document's Notes/Scope tab.

NoteB = copy the third note field from the document's Notes/Scope tab.

LaborAccount

Specifies (in the result value) the default value for PJPROJ.labor_gl_acct. The result value accepts a Microsoft Dynamics SL labor GL account number.

LaborRateTable

Specifies (in the result value) the default for PJPROJEX.rate_table_labor. The result value accepts a Microsoft Dynamics SL labor rate table ID.

ManualBudget

Specifies (in the result value) whether sfPMS should prevent the Initial Budget document from being automatically created when the Project Setup document is first saved.

☐ (✕) = **0,** No (default).

☑ (✔) = **1,** Yes.

ManualProjectInfo

Specifies (in the result value) whether sfPMS should prevent the extended Project Information document from being automatically created when the Project Setup document is first saved.

☐ (✕) = **0,** No.

☑ (✔) = **1,** Yes.

ManualRevenue

Specifies (in the result value) whether sfPMS should prevent the contract value from being posted as the revenue amount on the Initial Budget. This setting has no effect if ManualValue = ✔ (see below).

☐ (✕) = **0,** No.

☑ (✔) = **1,** Yes.

ManualSubmittalRegister

Specifies (in the result value) whether sfPMS should prevent the empty Submittal Register from being created when the Project Setup document is first saved.

☐ (✕) = **0,** No.

☑ (✔) = **1,** Yes.

ManualValue

Specifies (in the result value) whether sfPMS should prevent the contract value from being posted.

☐ (✕) = **0,** No (default).

☑ (✔) = **1,** Yes.

ModuleStatus

Specifies (in the result value) the external module status in PJPROJ in Microsoft Dynamics SL.

A = Active (default).

I = Inactive.

OwnerDirectCommitments

Specifies (in the result value) whether Commitments should default to Owner Direct.

☐ (✗) = **0,** No (default).

☑ (✓) = **1,** Yes.
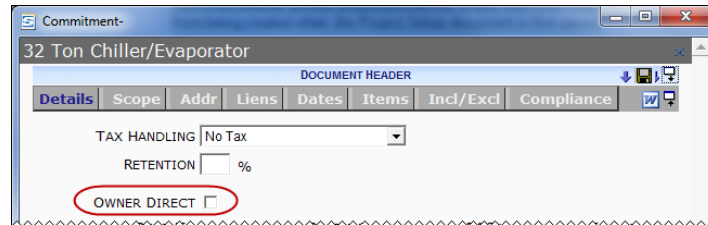
PAStatusByCustomer

Remaps the project accounting status in PJPROJ for certain customers in Microsoft Dynamics SL.   This rule uses the customer status (as defined in Microsoft Dynamics SL's customer record) as the filter value. The result value accepts any code listed for the **PAStatusMap** rule. By default, the project accounting status remains the status as determined by the **PAStatusReject** rule.

PAStatusMap

Sets the project accounting status in PJPROJ in Microsoft Dynamics SL. The result values below use the DocStatus code (as defined in the Code Maintenance tool) as the filter value.   See also KBA-01317.

A = Active (default).

D = Delete.

I = Inactive.

M = Plan.

P = Purge.

T = Terminate.

NA = leave the Microsoft Dynamics SL value in PJPROJ.status.pa unchanged.

PAStatusReject

Remaps the project accounting status in PJPROJ for certain customer reject codes in Microsoft Dynamics SL. This rule uses the customer reject code (as defined in Microsoft Dynamics SL's customer record) as the filter value. The result value accepts any code listed for the **PAStatusMap** rule. By default, the project accounting status remains the status as determined by the PAStatusMap rule.

ProjectNoteMap

Specifies (in the result value) the Project Setup/Contract note to be copied toPJPROJ/SNOTE in Microsoft Dynamics SL.

Note = copies the first note field from the document's Notes/Scope tab.

NoteA = copies the second note field from the document's Notes/Scope tab.

NoteB = copies the third note field from the document's Notes/Scope tab.

ProjectType

Specifies (in the result value) the Project Type for the specified SubType code.

D = Data.

E = Equipment.

P = Standard Project (default).

RevenueRecognition

Specifies (in the result value) the default for PJPROJEX.rev_type in Microsoft Dynamics SL. The result value accepts a Microsoft Dynamics SL revenue recognition code (or you can leave the result value empty).

SpitfireOnly

Specifies (in the result value) whether the project should be created only in sfPMS (and not in Microsoft Dynamics SL). Many of the ProjectConfig rules are meaningless for Spitfire-only projects.

☐ (✕) = **0,** No (default).

☑ (✔) = **1,** Yes.

SubmittalLeadDays

Specifies (in the result value) the default Lead Days (Duration) for new Submittal Registers. This value is then used by the Submittal Item Log report. This rule applies only when the **ManualSubmittalRegister** rule (see above) = ✕ and the Submittal Register Doc type is active during project creation. The default is **0**.

UtilizationType

Specifies (in the result value) the default for PJPROJ.pm_id37. The result value accepts a Microsoft Dynamics SL utilization type code.

ValueCheck

Specifies (in the result value) whether and how the contract value should be checked against the budget.

Exact = contract value must be equal to the budget.

GE = contract value must be greater than or equal to the budget

None = contract value is not checked against the budget.

ProjectKPIFormulas

The ProjectKPIFormulas rule group defines computations for the Key Performance Indicators (KPI) part of the Project Dashboard. These are advanced rules. Computed fields might be used to display a value in a column, or the value might be a step in a larger calculation (see cmpNetCashDemand that uses cmpCashConversion, etc). The rules for formulas are the same as those for the merge template computed bookmarks. Relationships and aggregation are of limited use on the KPI.

See also KBA-01228.

Filter Value

None

The ProjectKPIFormulas rules do not use filter values.

Result Value

Formula

All the ProjectKPIFormulas rules accept a formula for the result value except ComputeList, which takes a list of computed value names. Default fieldnames are listed in the chart on the next page. **Note**: there is a 196-character limit in the Result Value field. If your text is longer than 196 characters you will need to

- Split your text into smaller segments, each of any length up to 194 characters,

- Append **$+** to the end of each segment, except the last one,

- Add a rule row for each segment. These rules should have names that indicate they are a continuation of the first rule, for example, Introduction, Introduction.01, Introduction.02, etc.

Rules

Act: *item name*

Associates a javascript action with the specified item name (from the Customization tool).

Rule	Filter Value	Result Value
act:Approved PR		vPgPopup('PopDocList', '&project=$$PROJECT&key=5B0A71D8-ED55-455B-BB99-2AB7D3B7A1CF&docstate=A',750,550);
act:ApprovedSC		vPgPopup('PopDocList', '&project=$$PROJECT&key=FF1975FD-76DE-486C-888B-54E8FCD880E0',750,550);
act:BilledToDate		PopTransHistory('$$PageDSK','$$PROJECT','%','@@BTD','%');
act:LessARRetention		PopTransHistory('$$PageDSK','$$PROJECT','%','@@RETENTION','%');
act:SCO		vPgPopup('PopDocList', '&project=$$PROJECT&key=234D47B9-A189-414E-A072-A4A82A6D850D&docstate=A',750,550);
act:BilledToDate	XTS	vPgPopup('PopDocList', '&project=$$PROJECT&key=0AFB17F9-7AEB-4444-B16E-898F89F4315C',750,550);

ComputeList

Lists the names of the computed values. sfPMS reads this rule first.
Each computed value must have a rule entry with the name of the
computed value as the rule name and a formula as the result value.

Cmp *Computed value name*

Indicates the formula for each computed value on the KPI part.

KEY PERFORMANCE INDICATORS

Contracts & Budgets		
Original Contract	cmpOriginalContract	$750,000.00
Posted CO	cmpApprovedCO	$131
Current Contract	cmpCurrentContract	$750,131
Unposted CO	cmpUnapprovedCO	$22,875
Original Commitment	cmpOriginalSC	$130,965
Approved CCO	cmpApprovedSC	$13,119
Current Commitment	cmpRevisedSC	$144,084
Pending CCO	cmpPendingSC	$500
Approved Pay Request	cmpSCPayReqTotal	$5,350
Commitment Remaining	cmpSCRemainingPay	$127,111
Original EAC	cmpOriginalBudget	$575,000
Current EAC	cmpCurrentBudget	$664,436
Actual + Committed Cost	cmpActualPlusCommitted	$83,600
Current FAC	cmpCurrentForecast	$575,000
Variance	cmpVariance	$89,436
Percent Spent	cmpPerComplete	13 %
Earned Income	cmpEarnedIncome	$55,243
Under Billed	cmpOverUnderBill	$39,743
Backlog	cmpFutureProfit	$30,453

AR Summary			
AGED AR			
Under 30		cmpAR30	$0
30 - 60 Days		cmpAR60	$0
60 - 90 Days		cmpAR90	$0
Over 90		cmpOldAR	$13,800
	TOTAL	cmpTotalAR	$13,800
UNBILLED			
Under 30		cmpUB30	$0
30 - 60 Days		cmpUB60	$0
60 - 90 Days		cmpUB90	$0
Over 90		cmpOldUB	$0
	TOTAL	cmpTotalUB	$0

Project Cash Flow		
Billed to Date	cmpBTD	$15,500
Less Open AR	cmpTotalAR	$13,800
Less Retention	cmpRetention	$1,550
CASH IN	cmpCashIn	$150
AP Cost to Date	cmpTotalCost	$13,899
Less Open AP	cmpTotalAP	$13,118
Less Retention	cmpAPRetention	$465
AP Cash Out	cmpCashOut	$316
Other Cash Out	cmpOtherCashOut	$35,033
NET CASH FLOW	cmpNetCash	($35,199)
Cash Conversion	cmpCashConversion	$55,093
Cash Funding	cmpCashFunding	$13,583
NET CASH DEMAND		$41,510
	cmpNetCashDemand	

Project Team

The Project Team rule group uses mapping from ProjectConfig | BTMapxxx rules (see page 119) to automatically add contacts to a project team.

See also KBA-01536.

Filter Value

None

The ProjectTeam rules do not use filter values.

Result Value

Email Address

The ProjectTeam rules accept a Contact's email address as the result value.

Rules

Mapped value from BTMapxxx rules:ID

Specifies (in the result value) the email address of a Contact to be added to a project team list according to the mapping. The ID identifies each member being added.

Example

If you wanted to have certain team members for projects that begin with **GC**, you would first set up the **ProjectConfig | BTMap** rules as such

%:%	Rule	Filter Value	Result Value
	BTMapFrom		PROJECT
	BTMapLen		2
	BTMapStart		1

> **TIP**
>
> Changes to these rules affect future projects. Contact support for assistance with applying changes to existing projects.

These rules tell sfPMS to look at Project IDs, start at the first character and use the first two characters as the mapped value in the Project Team rules.

Then the **ProjectTeam** rules for projects that begin with GC would be set up as such:

	Rule	Filter Value	Result Value
	GC:10		joe@acme.com
	GC:20		chris@acme.com
	GC:30		shawn@acme.com

RecurIncrement

The RecurIncrement rule group converts Recur codes into three numbers defining the recurrence rate (in days;months;years). There should be one rule per Recur code.

Filter Value

None

The RecurIncrement rules do not use filter values.

Result Value

Three Numbers

The RecurIncrement rules accept three numbers separated by semicolons as result values, for example, **0;1;0**. The first number indicates recurring days, the second number indicates recurring months and the third number indicates recurring years.

Rules

Any Recur code

The RecurIncrement rules accept any Recur code (as defined in the Code Maintenance tool).

Example

ReportConfig

The ReportConfig rule group allows customization of SQL Server Reporting Services (SSRS) RDL paths, and provides default report parameters.

See also KBA-01445.

Filter Value

Any Doc type

The ReportConfig rules accept any Doc type (as defined in the Doc Types tool and appearing on the filter drop-down) as the filter value.

Result Value

Any path and report parameters

The ReportConfig rules accept a free form string with the path to the report in SSRS as the result value. The result value can include report parameters. Spaces should be replaced by **%20**. Percent signs (%) should be replaced by **%25**.

Each report parameter should begin with an ampersand (**&**) followed by the report parameter name defined in the report, followed by an equal sign (**=**) and value. The value can include a placeholder. The report viewer will lock down any parameters passed into the report in this way. The user will not see or be able to change the value passed. Common placeholders are

- **$$DocNo$$** is replaced by the document number.
- **$$Duration$$** is replaced by the Duration field of the document.
- **$$FDate$$** is replaced by the From date filter on the site conditions history window.
- **$$PK$$** is replaced by the document key (GUID).
- **$$Project$$** is replaced by the project ID.
- **$$RejectCode$$** is replaced by the Reject/Reason code of the document.
- **$$SourceContact$$** is replaced by the Source Contact.
- **$$TDate$$** is replaced by the To date filter on the site conditions history window.

Rules

CILOG

Defaults to _**Library/COR Inquiry** and automatically adds **&pProject=$$Project$$**.

CIPAYLOG

Defaults to _**Library/Change Item Payment Log Inquiry** and automatically adds **&pProject=$$Project$$&pDocMasterKey=$$PK$$**.

DocPrintMenuText

Specifies (in the result value) the text that should appear on the Document Options menu for the document's report (as established through the **Report** rule). The default is **Report**.
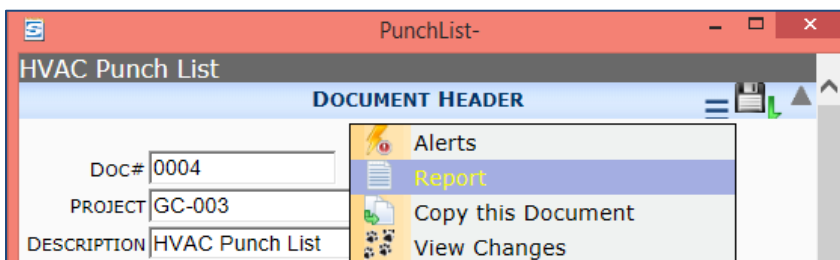
EquipPrint

Defaults to _**Library/Equipment%20Profitability** and automatically adds **&pProject=$$Project$$**.

MenuList

Specifies (in the result value) the reports to be added to the Document Options drop-down menu in form of *ID1 = menulabel1*; *ID2 = menulabel2*; *ID3 = menulabel3*, etc. Each ID must also correspond and be defined in its own rule (such as CILOG, CIPAYLOG, SCPAYHIST, etc.). The system automatically adds **&pProject=$$Project$$&pDocMasterKey=$$PK$$**.
Note: We recommend using ZC as a prefix for your custom report definitions, for example:

Report

Specifies (in the result value) the path and the report name in SQL Server Reporting Services (SSRS) to customize the default document print format for a Doc type (and what the icon on the Document Options drop-down menu will show). See also KBA-01088.

SCCOMPLOG

Defaults to _**Library/Compliance%20Exception%20Log** and automatically adds **&pProject=$$Project$$&pSubcontractor=$$SourceContact$$**.

SCOLOG

Defaults to _**Library/CCO%20Log** and automatically adds **&pProject=$$Project$$&pSubcontract=$$Docno$$&pVendor=%25&GroupBy=0**.

SCPAYHIST

Defaults to _**Library/Commitment%20Payment%20Detail** and automatically adds **&pProject=$$Project$$&pCommitment=$$Docno$$&pVendor=%25**.

SCPAYREQ

Defaults to _**Library/Pay%20Request%20Log** and automatically adds **&pProject=$$Project$$&pSubcontract=$$Docno$$&pVendor=%25& GroupBy=0**.

SITECOND

Defaults to _**Library%2fSite+Conditions+Log** and automatically adds **&pProject=$$Project$$&pFDate=$$FDate$$&pTDate=$$TDate$$.**

SUBMITMLOG

Defaults to _**Library/Submittal%20Item%20Log** and automatically adds **&pProject=$$Project$$**.

XmitItems

Specifies (in the result value) an alternate report to be used when a document is routed via e-mail or fax. The result value accepts the path and the report name in SQL Server Reporting Services (SSRS). This rule overrides the Report rule (see above). See also KBA-01088.

0 = do not route or use any alternate report.

ZC%

Defines a custom report. Contact your implementer.

RouteApproved

The RouteApproved rule group indicates which RouteStatus codes send the document on to the next routee (if any) and remove the document from the current routee's Inbox.

Filter Value

None

The RouteApproved rules do not use filter values.

Result Value

Yes/No

The RouteApproved rules accept a blank ☐ or a checkmark ☑ as the result value.

☐ (✕) = **0,** No. The RouteStatus code does not send the document on to the next routee.

☑ (✓) = **1,** Yes. The RouteStatus code sends the document on to the next routee.

Rules

Any RouteStatus code

The RouteApproved rules accept any RouteStatus code (as defined in the Code Maintenance tool).

See the example on the next page.

Example

RULE MAINTENANCE				
GROUP:	r		☑ SHOW CODE SET	

	Rule Group	Filter Info	Type	Description
▲	RouteApproved		Boolean	Lists the codes that classify a routing as approved

RULE ENTRIES	

RULE NAME		☐ SITE ONLY

	Rule	Filter Value	Result Value	SF
▼				
📄	Ⓐ		✓	✓
📄	Ⓣ		✓	✓

CODE SET	

SET NAME LIKE:	routestatus

	Set Name	Set Type	Flag	Next Set	Size
✎ ▲	RouteStatus	RouteStatusList	OnAdd	✕	1

SET NAME	RouteStatus	DESCR LIKE:	
CODE LIKE:			

Code	Description	OnAdd
Ⓐ	Responded	✕
B	Sent Back	✕
C	CC'd	✓
D	Destination	✓
G	Pending Any	✓
H	Held	✕
N	No Action	✕
P	Pending	✓
R	Restarted	✕
Ⓣ	Sent On	✕

RouteConfig

The RouteConfig rule group allows customization of routing options.

See also KBA-01391.

Filter Value

Any Doc type

The RouteConfig rules accept a Doc type (as defined in the Doc Types tool and appearing on the filter drop-down) as the filter value.

Result Value

Varies

Result values for the RouteConfig rules depend on the rule and are indicated within the description of each rule.

Rules

AutoStage

Specifies (in the result value) the maximum number of sequences in a route. Once the maximum is reached, the document will start a new routing stage for subsequent sequences, repeating the process as necessary. The result value accepts any number.

0 = disable this feature.

AutoStageNewRevision

Specifies (in the result value) whether a new routing stage should automatically be created when a new document revision is saved. If yes, the current user's route record will be set to restarted or a route will be added to record the restart.

☐ (✕) = **0,** No (default).

☑ (✓) = **1,** Yes.

DefaultStatus

Specifies (in the result value) the status that appears by default for the New Status field on the Build Route dialog box.

C = CC'd.

G = Pending Any.

P = Pending (default).

DocAttendeeFilter

Specifies (in the result value) the filter expression for including attendees when the Attendees option is used on the Build Route dialog box (as shown above). The result value accepts an expression that can reference fields in the xsfMeetingAttendee table (except for UserKey and LinkedItemKey) For example:

False = include no Attendees.

True = include all Attendees (default).

Regular = include only Attendees that are checked as Regular.

EmailSenderSuffix

Specifies (in the result value) the suffix for the "email from" name, when the **NotOnBehalfOf** rule (see below) has been set to ✓. This rule does not accept a filter value. The default is **via Project Management**.

FaxingEnabled

Specifies (in the result value) whether the system supports faxing (i.e., allow Contacts to be designated Route Via Fax, offer Route Via Fax as an option for routees, and send out faxes through automated routes). This rule does not accept a filter value.

☐ (✗) = **0,** No.

☑ (✓) = **1,** Yes (default).

ImpliedResponse:*X*

Specifies (in the result value) the ResponseCode (as defined in the Code Maintenance tool) that should be used automatically as the Rsp on a route row with no manually selected Rsp, when the route row status is changed to the indicated status (even through 👍). *X* is any RouteStatus code (as defined in the Code Maintenance tool).

JPGMergeMaxPerPg

Specifies (in the result value) the number of JPG images to be assembled per page in routed content. This rule does not accept a filter value; it is system-wide.

2 = two images in a single column per page.

3 = three images in a single column per page.

4 = four images in a single column per page (default). Note: by default, the 4 will be decreased automatically if white space on the last page can be reduced without increasing the total number of pages.

6 = six images in two columns (down one column, then down the second column).

8 = eight images in two columns.

MaxAssembledKB

Specifies (in the result value) the maximum file size allowed for assembled PDFs to be included in routed output. The default is **8192** KB. **Note**: the calculation is approximate.

MaxAssembleFileKB

Specifies (in the result value) the maximum file size that can be included in an assembled PDF that is part of routed output. The default is **2355** KB.

MaxSendKB

Specifies (in the result value) the maximum outbound email size in KB. This rule does not accept a filter value; it is system-wide. The minimum allowed value is 10. The default is **8192**. **Note**: if this value changes, it will not take effect until the system is recycled.

MultiLookup

Specifies (in the result value) which lookup should be used for the Selected Recipients option of the Build Route dialog box.

CustomerContactList = all Contacts who are Customers.

FullContactList = all active Contacts (default for all Doc types except Bid Package and Invitation to Bid).

SubcontractorList = all Vendors marked as subcontractors in the Company Contact window (default for Bid Package and Invitation to Bid Doc types).

UserContactList = all Contacts who are Spitfire users.

NotOnBehalfOf

Specifies (in the result value) the default email sender format. This rule does not accept a filter value.

☐ (✗) = **0,** No (default). The format is **On Behalf of** *name.*

☑ (✔) = **1,** Yes. The format is *name **EmailSenderSuffix**.*

NotVia

Specifies (in the result value) which Route Via methods should not be considered when routing a document.

E = email.

EF = email and fax.

F = fax.

W = web (Spitfire Inbox).

WE = web (Spitfire Inbox) and email.

WEF = web (Spitfire Inbox) email and fax.

WF = web (Spitfire Inbox) and fax.

PDFMergeRenumberPages*

Specifies (in the result value) the page number stamp to be added to pages in a final merged PDF. This may conflict with or nicely augment existing page numbering in the merged files.

0 = do not renumber (default).

1 = use the following default settings— Bottom=9.9; Font=Arial; ForeColor=Brown; HAlign=Right; InBackground=0; Size=9; StartOn=1; StartWith=1; Style=Regular; Text=Page # of {1} (assembled {0:d} {0:t}

Any formula string = use the indicated settings in the semicolon-separated string where:

- **Bottom=*n*** specifies the bottom margin.

- **Font=*a font name*** specifies the font to be used for the page number stamp.

- **ForeColor=*any HtmlColor name or #000000*** specifies the color for the page number stamp.

- **HAlign=Right *or* Left *or* Center** specifies if the page number should be right, left or center justified.

- **InBackground=0 *or* 1** specifies if added page numbers are on top of (0) or below (1) anything already on the page at that location.

- **Left=*n*** specifies the left margin.

- **Right=*n*** specifies the right margin.

- **Size=*n*** specifies the font size.

- **StartOn=*n*** specifies the page number on which to start adding page numbers.

- **StartWith=*n*** specifies the starting page number for the first page of the final PDF.

- **Style=Regular *or* Bold *or* Italics** specifies the style of the font.

- **Text=*string* *(see example above)*** must be last and specifies the text to be used where:

- o **#** is replaced by the specific page number,
- o **{0}** is replaced by the merge time (and can be combined with :d and :t to include "as of" stamping),
- o **{1}** is replaced by the total number of pages in the merged document.

SelfService

Specifies (in the result value) the name of a predefined route that will override any other predefined routes (created in the Routes tool) when the document is created in "self-service" mode. Current applicable filter values are **RFQ** and **Pay Request** only. The result value must match the name of an existing predefined route.

SendDownloadLink

Specifies (in the result value) if and when the outbound email message should include the link for downloading the content. (See also the **EmailText | LinkToContentMsg** rule on page 85.)

Always = include the link to the Download Wizard on every email that has attachments, whether or not the attachments have been omitted due to size.

Auto = include the link to the Download Wizard on emails with attachments that have been omitted due to size or type (default).

Only = include the link to the Download Wizard on all emails with attachments but exclude all attachments (forcing the use of the Download Wizard and its ability to record receipt).

Seq1DueInDays

Specifies (in the result value) the number of days from the current day for the initial route due date (for sequence 1, normally the document creator).

-1 = no default due date.

0 = due now (default).

1 = due in 1 day.

n = due in n days.

WithTransmittal

Specifies (in the result value) whether the transmittal option on the Routee Options menu should be turned on by default.

☐ (✕) = **0,** No.

☑ (✓) = **1,** Yes.

WizardAuthentication

Specifies (in the result value) whether the Download and Route Response Wizards should require authentication from the user.
Note: if the document is flagged as Confidential, authentication will be required regardless of this rule.

☐ (✕) = **0,** No (default). The correct link is sufficient to proceed.

☑ (✓) = **1,** Yes. User authentication is required to proceed.

RouteResponseIsYes

The RouteResponseIsYes rule group specifies the route response codes that indicate an affirmative response.

Filter Value

Any Doc type

The RouteResponseIsYes rules accept a Doc type (as defined in the Doc Types tool and appearing on the filter drop-down) as the filter value.

Result Value

The RouteResponseIsYes rules accept a blank ☐ or a checkmark ☑ as the result value.

☐ (✕) = **0,** No. The Response code does not indicate an affirmative response.

☑ (✓) = **1,** Yes. The Response code indicates an affirmative response.

Rules

Any ResponseCode code

Indicates (in the result value) that the specified ResponseCode code (as defined in the Cost Maintenance tool) should behave as indicated in the result value.

Example

RouteWhenStatus

The RouteWhenStatus rule group indicates how routing is to be handled when a document state changes (to closed or pending).

See also KBA-01177.

Filter Value

Any Doc type

The RouteWhenStatus rules accept a Doc type (as defined in the Doc Types tool and appearing on the filter drop-down) as the filter value.

Result Values

The RouteWhenStatus rules accept one or more of the following as the result value.

Append *routename list*

Adds the comma-separated list of specified automated routes (defined through the Routes tool) to the current routing. You can use the keyword **AUTO** for the Spitfire-selected route to also be appended, for example, **Append AUTO,Auditor**. This result value can be included with one of the other options, for example, **EndRoute;Append HistoricalArchiver, Auditor**.

CCRemaining

Changes the route status of all remaining routees to CC'd.

CCToLast

Changes the route status of all remaining routees, except the last one, to CC'd.

EndRoute

Changes the route status of all remaining routees to Sent On.

Rules

Default

Specifies (in the result value) that all DocStatus codes that have been designated "closed" through **DocStatusIsClosed** rules (see page 65) should trigger the routing behavior indicated in the result value.

DefaultPending

Specifies (in the result value) that all DocStatus codes that have been designated as "pending" through **DocPending** rules (see page 63) should trigger the routing behavior indicated in the result value.

Any DocStatus code

Indicates (in the result value) that the specified DocStatus code (defined in the Cost Maintenance tool and designated as a closed status through the DocStatusIsClose rule) should trigger the routing behavior indicated in the result value.

Example

SaveCustomDocExtn

The SaveCustomDocExtn rule group allows custom stored procedures to be run during the document save transaction. These advanced rules require TSQL programming. In addition, these rules have no effect unless the **DocTypeConfig | CustomSaveExtensions** rule is set to ✓ (see page 74).

Note: (except for On Final) if your stored procedure raises an exception, the entire document save transaction is rolled back and the exception text is displayed.

Warning: Use of this rule can have unintended and serious consequences!

See also KBA-01183.

Filter Value

Any Doc type

The SaveCustomDocExtn rules accept a Doc type (as defined in the Doc Types tool and appearing on the filter drop-down) as the filter value.

Result Value

Stored Procedure

The SaveCustomDocExtn rules accept the name of any stored procedure as the result value. This procedure must be owned by 'DBO'. Consult the Developer's Primer for details on the parameters passed to the stored procedure: @pDocKey, @pDocRevKey and @pUserKey.

Rules

OnApproveInitial

Specifies (in the result value) the stored procedure that should be used at the beginning of the save transaction, when the new document state is Approved.

OnApproveWrapup

Specifies (in the result value) the stored procedure that should be used at the end of the save transaction, when the new document state is Approved.

OnApproveWritten

Specifies (in the result value) the stored procedure that should be used near the end of the save transaction, after row data has been updated, when the new document state is Approved.

OnCloseWrapup

Specifies (in the result value) the stored procedure that should be used at the end of the save transaction when the new document state is Closed (but not Approved).

OnFinal*

Specifies (in the result value) the stored procedure that should be used to send data after the save transaction. The extension will have access to audit data using a fourth parameter (@pAuditWhen) but cannot roll back the save because it has already been committed.

OnInitial

Specifies (in the result value) the stored procedure that should be used at the start of the save transaction for previously saved documents.

OnNewWrapUp

Specifies (in the result value) that the stored procedure should be used at the end of the save transaction for new documents.

OnPendingInitial

Specifies (in the result value) the stored procedure that should be used at the beginning of the save transaction, when the new document state is Pending/Committed.

OnPendingWrapup

Specifies (in the result value) the stored procedure that should be used at the end of the save transaction, when the new document is Pending/Committed.

OnPendingWritten

Specifies (in the result value) the stored procedure that should be used near the end of the save transaction, after row data has been updated, when the new document state is Pending/Committed.

OnWrapup

Specifies (in the result value) the stored procedure that should be used at the end of the save transaction for previously saved documents.

SOVConfig

The SOVConfig rule group allows customization of certain Schedule of Values (SOV) workbook options.

See also KBA-01369.

Filter Value

Any SubType code

The SOVConfig rules accept a SubType code (as defined in the Code Maintenance tool) as the filter value.

Result Value

Varies

Result values for the SOVConfig rules depend on the rule and are indicated within the description of each rule.

Rules

TIP

For more information about the SOV workbook, see the *Focus on Schedule of Values (SOV) Billing* guide.

BFCL-Enabled

Specifies (in the result value) whether the SOV "build/fill from commitment line" feature is enabled. If this rule = ✕, none of the other BFCL rules will have any effect.

☐ (✕) = **0,** No (default).

☑ (✓) = **1,** Yes.

BFCL-GroupNumLen

Specifies (in the result value) the number of characters from the Commitment Doc number to be used for the SOV subtotal group ID.

0 = grouping is off.

1 – **16** = use this many characters from the Commitment Doc number.

BFCL-WBSExcludeLen

Specifies (in the result value) the integer length of the portion of the cost code to be excluded from mapping. The default is 32 and does not need to be changed unless the merge-relevant section of the cost code portion does not include the last characters. Trailing spaces are ignored.

BFCL-WBSExcludeList

Specifies (in the result value) the semicolon-separated list of cost codes (or portions thereof) that should be excluded from mapping. Commitment lines with matching cost codes will not be offered for mapping. The default is blank/empty, meaning exclude all.

BFCL-WBSExcludeStart

Specifies (in the result value) the integer starting position within the cost code for the exclusion basis. The default is **1** and does not need to be changed unless the relevant section of the cost code portion does not include the first characters.

BFCL-WBSMerge

Specifies (in the result value) how merging of Commitments with the same work-breakdown-structure should be handled.

0 = no merging occurs.

1 = all Commitments with the same WBS are merged to the same SOV line.

Auto = WBS (or portion thereof) that are repeated across Commitments are merged on the SOV, but repeats within a single Commitment are not merged (default).

BFCL-WBSMergeLen

Specifies (in the result value) the integer length of the portion of the cost code to be considered for merging. The default is **32** and does not need to be changed unless the merge-relevant section of the cost code portion does not include the last characters. Trailing spaces are ignored.

BFCL-WBSMergeList

Specifies (in the result value) the semicolon-separated list of cost codes (or portions thereof) that should be merged. Defaults to blank/empty, which means all cost codes.

BFCL-WBSMergeStart

Specifies (in the result value) the integer starting position within the cost code for the merge basis. The default is **1**.

BFCL-WithHeaders

Specifies (in the result value) whether headers should be added with Commitment titles.

☐ (✕) = **0,** No (default).

☑ (✓) = **1,** Yes.

RevenueAccount

Specifies (in the result value) the account category with which AR should be tracked.

RevenueWBCode

Specifies (in the result value) the target code in the WBS against which AR should be credited. This WBS code should exist on the project. Actual revenue and billed-to-date values will appear on subsequent BFA snapshots.

SOVCOLineMerge

Specifies (in the result value) how Change Items are to be merged into the Schedule of Values for Pay Applications. This rule applies only to Change Items that are set to append to the SOV, not those that are mapped to existing lings or new Billing Codes.

☐ (✗) = **0,** new line per Change Order.

☑ (✓) = **1,** new line per Change Item (default).

SOVExportToFB

Specifies (in the result value) the Pay Application DocStatus code (as defined in the Code Maintenance tool) that enables export of SOV data to Microsoft Dynamics SL's Flexible Billing when the Pay Application document is set to that status.   Usually, the code for **Invoiced** is used.
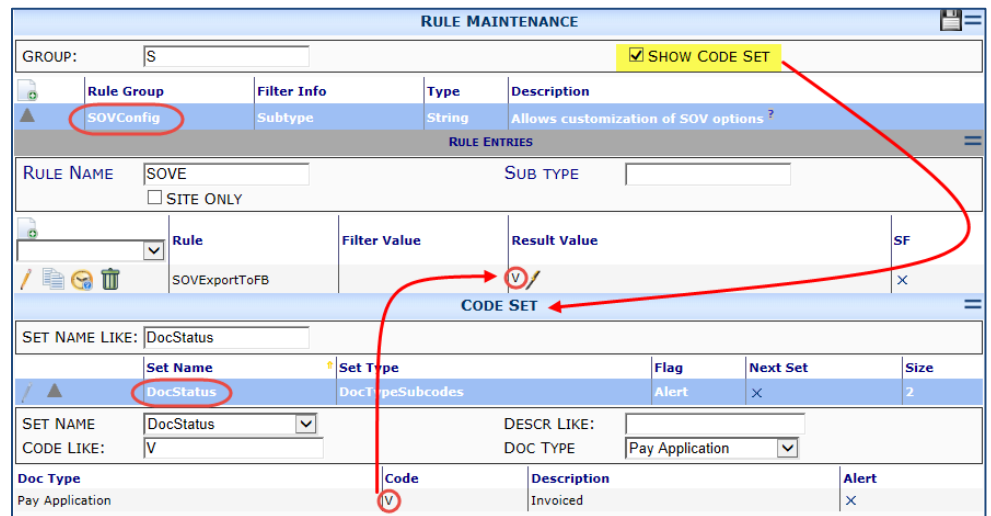
SOVFromBid

Specifies (in the result value) whether Items from an awarded Bid should be automatically copied to the SOV workbook.

☐ (✗) = **0,** No.

☑ (✓) = **1,** Yes (default).

SOVPlural

Specifies (in the result value) whether sfPMS should support more than one independent series (chain) of Schedule of Values on the same project.
(See KBA-01352.)

☐ (✗) = **0,** No (default).

☑ (✓) = **1,** Yes.

SOVRetention

Specifies (in the result value) the default retention percentage for the Pay Application. The result value accepts any integer between **0** (zero percent) and **100** (100 percent) inclusive. The default is **10** (indicating 10 percent).

SOVWithUnits

Specifies (in the result value) whether units should be supported and displayed in Schedule of Values billing.

☐ (✕) = **0,** No (default).

☑ (✓) = **1,** Yes.

TaxRetentionWhenReleased

Specifies (in the result value) whether tax should be automatically calculated when retention is released (as opposed to when retention is booked.)

☐ (✕) = **0,** No. Tax will be automatically calculated when retention is booked.

☑ (✓) = **1,** Yes. Tax will be automatically calculated when retention is released.

VendorConfig

The VendorConfig rule group allows non-integrated sites to provide defaults for Account Category, GL Account and Subaccount. (Integrated sites set these defaults in the accounting system and sfPMS then acquires the appropriate values from the accounting system.) The VendorConfig rule group also sets a synchronization option for integrated sites and a ratings option for both integrated and non-integrated sites.

See also KBA-01304.

Filter Value

Any Vendor ID

The VendorConfig rules accept a Vendor ID, except where indicated.

Result Value

Varies

Result values for the VendorConfig rules depend on the rule and are indicated within the description of each rule.

Rules

AccountCategory

Specifies (in the result value) the default Account Category for non-integrated sites. The result value should match an expense account in the Account Categories tool on the System Admin Dashboard.

Class: *vendorclass code*

Specifies (in the result value) the vendor class code (as established in the accounting system) that will be limited or excluded from synchronization. This rule is valid for integrated sites only. It does not take any filter value.

0 = exclude the vendors with the specified code from synchronization.

%mask = limit the vendors with the specified code to those that match the result value.

Note: all other vendors will be included in the synchronization.

ExpGL

Specifies (in the result value) the default GL Account for non-integrated sites. The result value can be any combination of letters and numbers.

ExpGLSA

Specifies (in the result value) the default Subaccount for non-integrated sites. The result value can be any combination of letters and numbers.

MinRating

Specifies (in the result value) the minimum rating a vendor is allowed to carry and still be granted new Commitments. The result value can be any positive or negative integer. The default is **0** (zero).

PJEX: *vendorclass code*

Specifies (in the result value) whether a vendor class code (as established in Microsoft Dynamics SL) should be considered "employee" during synchronization.
Note: in order to be considered an employee, the employee and vendor combination must also appear in the Microsoft Dynamics SL PJEMPLOY table.

☐ (✕) = **0,** No. Exclude the vendor class code from the project employee/resource synch.

☑ (✓) = **1,** Yes. Include the vendor class code from the project employee/resource synch (default).

WBAConfig

The WBAConfig rule group controls various optional behavior of the work-breakdown-account category.

See also KBA-01388.

Filter Value

None

The WBAConfig rules do not use filter values.

Result Value

Varies

Result values for the WBAConfig rules depend on the rule and are indicated within the description of each rule.

Rules

Freight

Specifies (in the result value) the Account Category that should be used to track shipping expenses. The result value accepts an Account Category from the Account Categories tool.

RemittedTax

Specifies (in the result value) the Account Category that should be used to track the portion of expenses that are attributed to the tax remitted to vendors. Once identified, this amount can be used to offset Use Tax liability. The result value accepts an Account Category from the Account Categories tool. The Account Category should be dedicated to remitted sales tax expenses.

RemittedTaxHandling

Specifies (in the result value) the TaxHandling code (as defined in the Code Maintenance tool) that should be used as the default for new Commitments.

NT = No Tax (default).

TA = Tax Added.

TI = Tax Included.

Revenue

Specifies (in the result value) the Account Category that should be used for Revenue by default. The result value accepts an Account Category from the Account Categories tool. The default is **REVENUE**.

Subcontract

Specifies (in the result value) the Account Category that should be used for subcontracted expenses. This Account Category is used internally to summarize the value of Commitments and CCOs when applying allocations and markups. The result value accepts an Account Category from the Account Categories tool. The default is **SUBCONTRACT**.

WBSConfig

TheWBSConfig rule group controls various aspects of new Cost Codes added to Microsoft Dynamics SL.

See also KBA-01358.

Filter Value

None

The WBSConfig rules do not use filter values.

Result Value

Varies

Result values for the WBSConfig rules depend on the rule and are indicated within the description of each rule.

Rules

Add:*costcode*

Specifies (in the result value) the description of the indicated cost code that will be automatically added to every new project. This rule is often used to add ubiquitous code codes that are used company-wide for things like Allowances, Contingencies, etc.

Add:% ⌄	Rule	Filter Value	Result Value
✎ 📄 ⟋ 🔍 🗑	Add:16000		All things electrical ✎

RelaxValidation

Specifies (in the result value) which cost code segments have optional validation in the BFA workbook.

0 = all validations implied by the cost code mask are applied (default).

001 = the 1st segment has optional validation.

002 = the 2nd segment has optional validation.

003 = the 1st and 2nd segments have optional validation.

004 = the 3rd segment has optional validation.

005 = the 1st and 3rd segments have optional validation.

006 = the 2nd and 3rd segments have optional validation.

007 = the 1st, 2nd, and 3rd segments have optional validation.

Note: you can add 8 to any of the prior values to include the 4th segment; 16 to include the 5th segment and 32 to include the 6th segment.

WKCCDataFrom

Specifies (in the result value) which data field in Microsoft Dynamics SL's PJCode to use. The Workers Compensation code mapping process extracts the **WKCCMapLen** number of characters starting at **WKCCMapStart** from the cost code being added and looks up a matching entry in PJCODE with the WKCCSource code type and returns either Data1 or Data2 from the PJCODE entry.

1 = PJCODE.Data1.

2 = PJCODE.Data2.

WKCCMapLen

Specifies (in the result value) the number of characters (starting at WKCCMapStart) from the cost code that should be used. The result value accepts a number.

WKCCMapStart

Specifies (in the result value) the starting position in the cost code. The result value accepts a number.

WKCCSource

Specifies (in the result value) the code type that should be used as the source of workers compensation coding. The result value accepts the four-character ID code from PJCODE.

WhenDocClosed

The WhenDocClosed rule group controls behavior of documents when they are closed.

See also KBA-01386.

Filter Value

Any Doc type

The WhenDocClosed rules accept a Doc type (as defined in the Doc Types tool and appearing on the filter drop-down) as the filter value as the filter value.

Result Value

Varies

Result values for the WhenDocClosed rules depend on the rule and are indicated within the description of each rule.

Rules

ApplyChildDocStatus

Specifies (in the result value) whether any open child documents attached to this document should be reviewed and mapped to a new status when the parent document is closed. ChildDocStatus and ChildDocStatusOnApproved (see below) are also needed. The filter value for this entry is the parent Doc type.

☐ (✕) = **0,** No.

☑ (✓) = **1,** Yes.

ChildDocStatus

Specifies (in the result value) the default status given to a child document mapped by the ApplyChildDocStatus test value. The result value indicates the new status for the child document. It accepts any DocStatus code defined in the Code Maintenance tool. The filter value for this entry is based upon the child Doc type.

ChildDocStatus:*x*

Specifies (in the result value) both the DocStatus code (for example, **ChildDocStatus:O**) that overrides the above default, and the status that should be given to the child document when the child document matches the aforementioned DocStatus code. The result value indicates the new status for the child document. It accepts any DocStatus code defined in the Code Maintenance tool.

ChildDocStatusOnApproved

Specifies (in the result value) the default status given to a child document mapped by the ApplyChildDocStatus rule, when the parent document was just approved. The result value indicates the new status code for the child document. It accepts any DocStatus code defined in the Code Maintenance tool. (See KBA-01387 for an example.)

ChildDocStatusOnApproved:*x*

Specifies (in the result value) both the DocStatus code (for example, **ChildDocStatusOnApproved:O**) that overrides the above default and the status that should be given to the child document when it matches the aforementioned DocStatus code and the parent document was just approved. The result value indicates the new status for the child document. It accepts any DocStatus code defined in the Code Maintenance tool.

Example

WordTemplateConfig

The WordTemplateConfig rule group configures and extends the data available to merge templates in Microsoft Word.

See also KBA-01323, and KBA-01476.

Filter Value

Any Doc type

The WordTemplateConfig rules accept a Doc type (as defined in the Doc Types tool and appearing on the filter drop-down) as the filter value.

Result Value

Varies

Result values for the WordTemplateConfig rules depend on the rule and are indicated within the description of each rule.
Note: there is a 196-character limit in the Result Value field. If your text is longer than 196 characters you will need to

- Split your text into smaller segments, each of any length up to 194 characters,

- Append **$+** to the end of each segment, except the last one,

Add a rule row for each segment. These rules should have names that indicate they are a continuation of the first rule, for example, Introduction, Introduction.01, Introduction.02, etc.

Rules

It is impossible to list all the possible rules in this rule group. There are a number of Spitfire-defined rules; you can review and override these defaults as necessary.

The various rules fall into the following types of entries:

alias:**FieldList**

Indicates (in the result value) fields to predefine. The result value accepts a list of fields, separated by semicolons. Use this rule if you wish to add several fields that depend on one another (this entry controls the order of definition) or wish to use your computed field for sorting or filtering. For example,

	Rule	Filter Value	Result Value
	ciCost:FieldList		Subcontract;ProjEntity

alias.fieldname

Defines (in the result value) a computed field. The result value accepts the computation. If the template engine encounters a bookmark that references a field that is not defined, it checks this rule for a dynamic definition. The formula definition follows the same principles as it would in an xCMP bookmark. Type can be DATE, DECIMAL, GUID, INTEGER, or STRING. By default, your computed field will be defined as a STRING. You can specify the type using the extended syntax: **as** *type* **=** *formula.* For example:

	Rule	Filter Value	Result Value
	ciCost.AccountCategory		PARENT(CICostTask).AccountCategory
	ciCost.CostRate		as DECIMAL = PARENT(CICostTask).RevenueAmount / PARENT (CICostTask).Quantity
	ciCost.LineDescription		IIF(ISNULL(PARENT(CICostTask).Note,'') <> '',PARENT (CICostTask).Note, $+
	ciCost.LineDescription.01		IIF(CostType <> 'SP' AND ISNULL(Subcontract,'') <> '','Subcontract: [DV_ciCost_Subcontract]', $+
	ciCost.LineDescription.02		'[DV_ciCost_ProjEntity]'))
	ciCost.ProjEntity		PARENT(CICostTask).ProjEntity
	ciCost.Qty		as DECIMAL = PARENT(CICostTask).Quantity
	ciCost.RevenueAmount		as DECIMAL = PARENT(CICostTask).RevenueAmount

q*alias*:Alias

Defines (in the result value) a TSQL query that creates an alias to be used in bookmarks on a merge template.

q*alias*:QPList

Specifies (in the result value) additional query parameters for the q*alias* (as defined in the **q*alias*:Alias** rule). The result value accepts a semicolon-separated list. **Note**: it is better to use parameters that are automatically supplied by default and simply use TSQL logic to gather any additional criteria.

q*alias*:QTimeout

Defines (in the result value) the number of seconds for running the dynamic query (as defined in the **q*alias*:Alias** rule) before SQL cancels the query. Normally, the system-wide default is adequate for well designed queries.

Table:ChildList

Defines (in the result value) a temporary (dynamic) child relationship. A table has child rows if some combination of fields in the "parent" table identify a set of rows in the "child" table. It is only necessary to use this rule when a dynamic relationship is being used and the bookmark references the relationship using a Child() function. The child table must be a :ParentList rule entry. The result value takes the form

ChildTableName1;ChildTableName2;ChildTableName3;etc.

For example,

SubcontractDetails:ChildList = SubcontractLineIdleDetails

SubcontractLineIdleDetails:ParentList =

	Rule	Filter Value	Result Value
	SubcontractDetails:ChildList		SubcontractLineIdleDetails
	SubcontractLineIdleDetails:ParentList		SubcontractLines = SubcontractDetails(Subcontract)

*Table:*ParentList

Defines (in the result value) a temporary (dynamic) parent relationship. One table can be the parent of another table if some combination of fields in the "child" table uniquely identifies a single row in the "parent" table. The result value accepts a string in the format

ParentRelationName = ParentTableName (parentfield1:childfield1, parentfield2:childfield2, etc.)

Note: Use *ParentRelationName* in PARENT (*ParentRelationName*) computed field expressions. See also KBA-01437.

xDetailedTrace

Specifies (in the result value) whether detailed output should be generated. Once enabled, detailed output remains enabled until the application is recycled. **Note**: this rule enables itself if any template generation results in an error.

☐ (✕) = **0,** No.

☑ (✔) = **1,** Yes.

xFilter_*alias*

Specifies (in the result value) the name of the field that should be used as a filter by default if an xFilter bookmark does not exist in the template.

xFormat:FR*anyformatname*

Defines (in the result value) standardized formats and provides a way to work around lengthy date format bookmarks in templates.

xSendDetails

Specifies (in the result value) an email address to which the template generation email should be sent. There is no default.

xSendExceptionsOnly

Specifies (in the result value) whether emails should be sent to the address indicated in the xSendDetails rule only if the template processing encounters some sort of exception or issue.

☐ (✕) = **0,** No.

☑ (✔) = **1,** Yes (default).

xShowData

Specifies (in the result value) whether all the document data should be included at the bottom of the template generation email. This rule is recommended if you can't find the data for which you are looking.

☐ (✕) = **0,** No.

☑ (✔) = **1,** Yes.

xSort_*alias*

Specifies (in the result value) the name of the field that should be sorted by default if an xSort bookmark does not exist in the template.

Index of Rules and Rule Groups