GoTechnology hub2 Bookmarking User Guide

How to Bookmark DOTX Templates

1. Introduction

Bookmarks are used to automatically populate fields and columns of data in a template. These templates can be generated from hub2.

P-03A Piping			I
I	**Mechanical Completion Piping Flushing / Testing Certificate (Test Pack Line List)**		I

| Test Pack No: I				
Description: I				
System: I				
Sub-System: I				
		Date	Sign	P/L
1	Confirm NDT & PWHT certification & Q/A release note available.			☐
2	Confirm all Punchlist 'A' Items within test limits are cleared.			☐
3	Confirm Piping Installation check sheet P01A complete.			☐
4	Pre-test preparations complete. Attach P&ID with test limits clearly marked.			☐
5	Release for pressure test. Reference Q/A release note No. _____			☐

Example of a bookmarked template

We can see several bookmarks indicated with the I symbol. When the document is generated, these fields will be populated with the relevant data, if it is in the database. As well as data, the bookmarks can be used to display logos and barcodes.

2. Setting Up Bookmarking

To effectively input and review bookmarks you can follow these steps:

- Open a template

- In Microsoft Word, click 'File'

- Click Options

- Click on the Advanced tab from the menu on the left-hand side

- Under the section called 'Show Document Control', select 'Show Bookmarks' check box
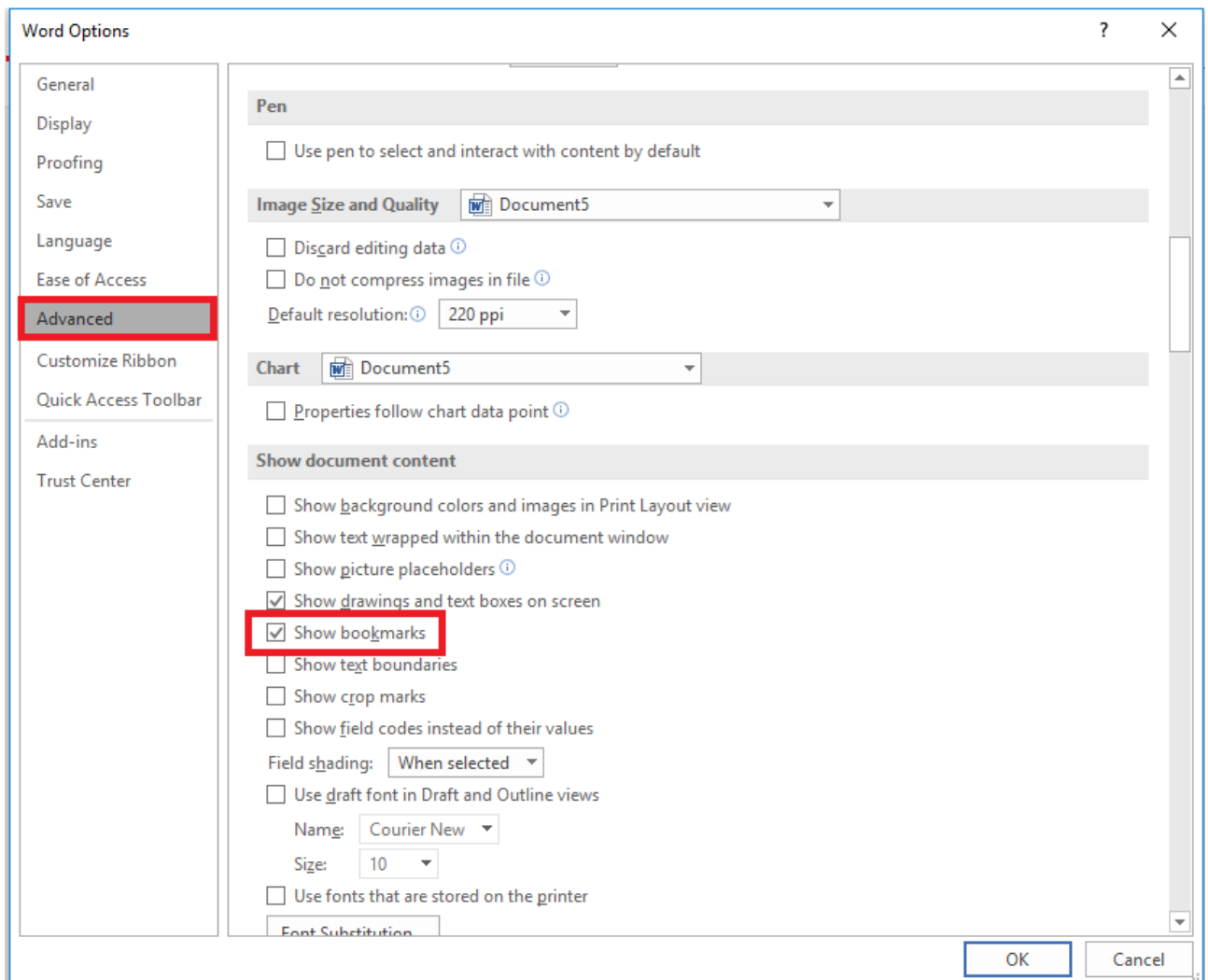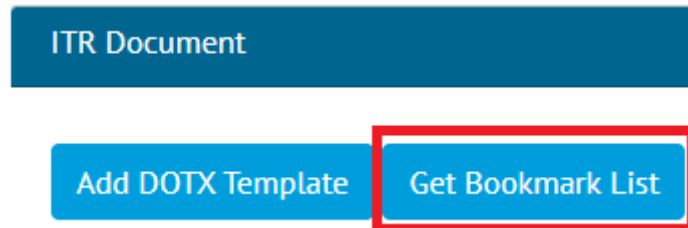

- Click OK

- If there are bookmarks on the template, they will be displayed as shown above in the template screenshot.

- If there are no bookmarks, you will have to bookmark the template.

- To open the bookmark window, click on the 'Insert' tab and click Bookmark. (Depending on your Word settings, you may have to click on Links > Bookmarks.)

Bookmark Management

3. Adding Bookmarks

To add a new bookmark, first refer to the 'Get Bookmark List' which is available on the hub2 instance.

To access this list, you can go to Ref Tables > ITRs > Ensure Generation Method is set to DOTX > 'Get Bookmark List'

Once you have identified which bookmark to input, click on the template where you would like the data to be shown and open the bookmark window. Input the bookmark name and click 'Add'.

If you want to show the same data in more than one place or on separate pages, you can add an underscore and a number to identify which bookmark position it is, for example TagName_1
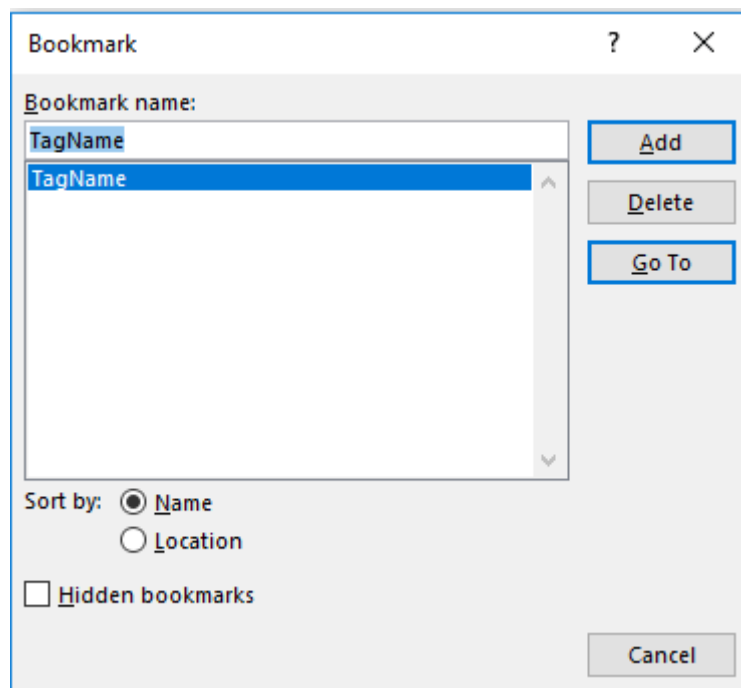
Bookmarking Window

4. Deleting Bookmarks

To delete a bookmark, open the Bookmark window, select the bookmark to delete and click 'Delete'.

5. Altering Bookmarks

When altering a bookmark, you need to open the Bookmark window, then 'Delete' the incorrect bookmark and then 'Add' the correct Bookmark afterwards. If the incorrect bookmark is not deleted, it will remain, and the new bookmark will be added on top of the original bookmark which could possibly end up displaying incorrect data.

6. Go to A Specific Bookmark

Open the Bookmark window, select the name of the Bookmark you want to find. Then click 'Go To' and it will highlight the bookmark on the document.

7. Headers and Footers

Data added in headers and footers will be repeated on every page generated. The header and footer will be copied with the data on each page.
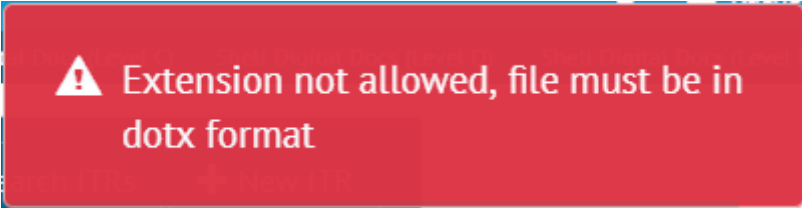
8. Logos and Barcodes

To add logos to a template, add the bookmarks 'LogoLeft' and 'LogoRight' in the two large squares shown in the template screen above. If the logos are required across multiple pages, add LogoLeft_1 and LogoRight_1.

To add a barcode, add the bookmark 'Barcode'. To show the barcode and barcode string, add the bookmarks 'Barcode' and 'DocumentReference'.

Converting to DOTX

To upload Word templates to hub2, they must be in dotx format. If they are not in dotx format, then the file will be rejected, and you will be unable to upload it.

⚠ Extension not allowed, file must be in dotx format