SpecsIntact

Learning Guide Series

QuickStart!

Numeric

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Front Cover

SpecsIntact QuickStart

SI Learning Guide Series

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About This Guide

The SI Learning Guide Series is designed to teach SpecsIntact users the concepts involved in successfully completing projects by fully utilizing all the tools provided in the SpecsIntact system. Each guide addresses a particular aspect of the system, and clearly outlines the major points a reader should understand at the completion of each chapter.

This ***QuickStart*** Guide provides a basic introduction to many of the concepts that will be covered in more depth in subsequent guides. It grew from a need to help new users get a fundamental understanding of SpecsIntact, but experienced users also find it helpful as a refresher course. It's not intended to cover in-depth every aspect of using SpecsIntact, but it is a good place to begin. This guide does not cover the installation process and assumes that you already have both SpecsIntact and Master text loaded on your computer system.

You are encouraged to use these guides in conjunction with the other user tools we provide, like the on-screen **Help**, ***QuickTours*** and our **Web Site** resources, which are all conveniently accessible from the SpecsIntact Explorer's **Help** menu.

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Introduction

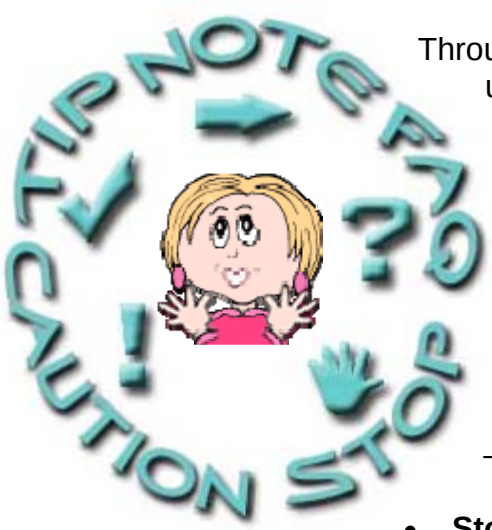
How to use this guide

We want learning SpecsIntact to be as painless as possible, so we've designed these guides to give you enough information to get you going successfully without overwhelming you with every possible detail.

Meet Sally

Sally will help guide you through the process of learning SpecsIntact. She'll point out the pitfalls as she prepares you to process your project!

Along the way, we'll point out key information that you should remember, and call your attention to things that you should avoid. At the beginning of each chapter, we'll outline what you need to learn from it, and at the end, we'll summarize the concepts you should have mastered.



Throughout the guide, we'll call your attention to important issues using the symbols at the left. Below is a brief explanation of what they mean:

- **Tip** — helpful hint that might make your work easier.
- **FAQ** — Frequently Asked Question — just that.
- **Note** — important point, so pay attention.
- **Caution** — the condition or action may cause problems — proceed at your own risk.
- **Stop** — means *stop* — don't do it or you may regret it later!

At the beginning and end of each chapter, Sally will outline the important points that the chapter covers. Before moving on to the next chapter, be sure you have an understanding of those points, since the subsequent chapters will build on that knowledge.

In this chapter you'll learn:

- Point one.
- Point two.
- Point three.
- Point four.
- Point five.

What you learned from this chapter:

- What you learned about point one.
- What you learned about point two.
- What you learned about point three.
- What you learned about point four.
- What you learned about point five.

Instructions that should be followed in sequence are numbered.

1 First you do this
2 Then you do this
3 Last, but not least, you do this

Text in **bold** indicates elements you will find on your screen or SpecsIntact terms:
File menu, **OK** button, **Section**

Actions appear in *italics:*
click, select

Lists of important points are bulleted.

Points to remember:

- Something
- Another thing
- Yet another thing

When you see the mouse symbol, it means you can also ***right-click*** to access the function.

SPEC

Support Problems Encountered Commonly

Here's where you'll find some real-life examples from our Tech Support Desk. Learning from others' mistakes is better than making your own! The situations are real, the names are not.

Overview

What is SpecsIntact?

SpecsIntact is an automated project management system for processing standard Masters used in facility construction and provides built-in quality assurance reports and automated functions that lets you adapt standardized facility construction specifications to fit your project.

Used worldwide by the National Aeronautics and Space Administration (NASA), the U.S. Naval Facilities Engineering Command (NAVFAC), and the U.S. Army Corps of Engineers (USACE), SpecsIntact makes it possible to assure quality control for project specifications from beginning to end.

A Brief SI History

1965 - Conceived by NASA

1986 - Adopted by NAVFAC

1988 - Adopted by USACE

The SpecsIntact system -- designed by NASA and managed at the Kennedy Space Center -- is used by engineers, architects, specification writers, project managers and construction managers doing business with the three supported government agencies.

Using SpecsIntact reduces the time and expense required to produce facility specifications, and helps eliminate costly construction changes due to omissions, discrepancies or improper quality controls.

So let's get going with SpecsIntact!

How is SpecsIntact able to check the accuracy of the various elements within the specifications?

It uses a special tagging system similar to the one that tells a web browser how to display a web page. This tagging enables the system's reports and other automated features, reducing the time required to complete your project. The quality assurance reports verify the accuracy of technical references, submittals, and other requirements. Now, you might be thinking that this tagging sounds mighty important — well it is! That's why in the subsequent pages, you'll learn how to get it right!

Chapter 1

SpecsIntact Basics

In this chapter you'll learn:

- What makes SpecsIntact unique.
- Some of the common terms used.
- What type of files can be used.
- The main components of SpecsIntact.
- The steps involved in producing a completed Job.

If not software, then what?

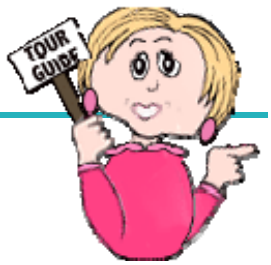
System yes, word processor, no…

One of the first basics you should know about SpecsIntact is that we refer to it as a system rather than just software.

The reason we call it a system is that it's much more than just a specification editing tool. It allows you complete management of your projects — choosing the specifications you need from standard guide specifications known as **Masters**, editing those specifications to fit your project, utilizing automated processes and quality control reports, and finally, producing your completed specifications in a choice of three formats.

If you follow the editing rules, use the quality controls and automated features, you can produce a final project that is complete and accurate.

Learning the language…



SpecsIntact Terms

If you're new to SpecsIntact, you may find some terms unfamiliar. Learning what they mean will help you understand how the system works and how to communicate more effectively regarding your project.

Some terms you'll encounter are unique to SpecsIntact, others are industry-related and may already be familiar to you, while still others are computer-related. Since SpecsIntact users come from a variety of backgrounds, we'll define terms for you as we go along.

You'll also discover that some common words have very specific meaning in SpecsIntact. For example, while working in a word processing document, you might say that you're having trouble with a section, referring to a portion of the document. But when working in SpecsIntact, a **Section** is actually an entire document. To help you avoid confusion, we'll point out SpecsIntact terms by capitalizing them and displaying them in **bold** when we discuss them.

Learning how to "speak SpecsIntact" makes it easier for you to fully utilize all its features and keep the Section structure correct. You'll learn more about Section structure in Chapter 3.

SpecsIntact Files

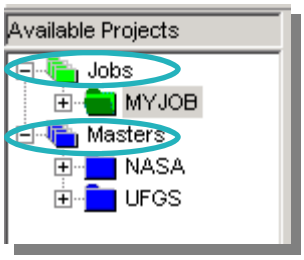
The type of files you edit in SpecsIntact are called **Sections** — when you see them on your computer system, they have a file extension of **.sec**. Although they can be created from scratch, most of the time you'll be editing Section files that you copy from a **Master**.

Masters contain 49 **Divisions** that group the Sections based on their content. You can identify which Division a Section belongs to by looking at the first two numbers in the Section Name. For example, Section **21 12 00 Standpipe Systems** comes from **Division 21 Fire Suppression**.

Master Sections are formatted with the tagging (there's that word again!) necessary for SpecsIntact's automated features to work, but you must edit the content of each to fit your particular project — usually referred to as a **Job**.

There are two menu items available from the SI Explorer's **Setup** menu that controls which Masters and Jobs are displayed in the left pane. Use the **Working Directories** command to choose the **Jobs** you want visible and the **Connect Masters** to choose which of the Masters on your system will be displayed. These two commands can be used at any time to change the display.

You'll see two main types of folders displayed in the SI Explorer — **Jobs** and **Masters**.
By clicking one of these folders in the left pane, you can display all the Section files it contains in the right pane.

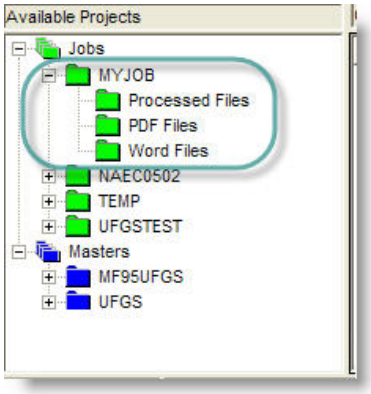


At the start, Section files are the only type your new project will contain, but as you work, you will produce other types, such as Reports and output files. The Section (**.sec**) files are ***always*** the "editing" copy from which the others are produced.

The ***only*** file type that is ever *edited* in SpecsIntact is the Section (.sec) file.

SpecsIntact Files

When you process and print a Job, you produce files with the **.prn** file extension (you'll learn more about processing in Chapter 5). These files are displayed in the left pane of the SI Explorer in the **Processed Files** subfolder under the Job. Just like the Job folder, clicking a subfolder displays its contents in the right pane. If you need to make further edits, you must ***always*** edit the Section (.sec) file, ***not*** the .prn file. When you process your Sections again, the new Processed Files will *replace* any previous .prn or Report files.



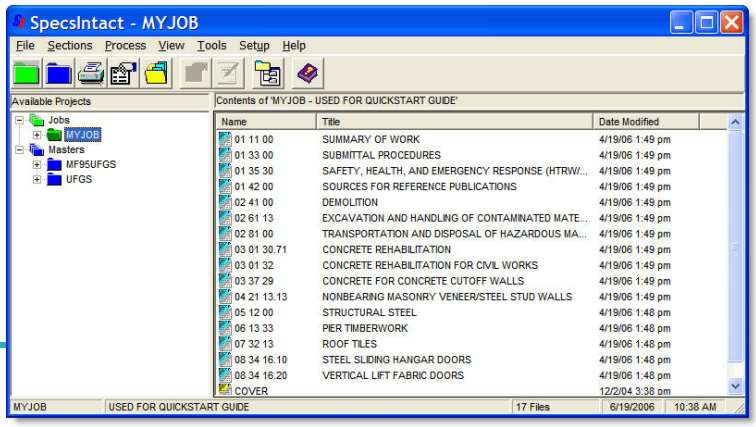
You can also produce processed files in two other popular formats: Microsoft **Word** and **Adobe Acrobat**. Of course, these require that you have the corresponding software on your system for the output feature to be available. These files cannot be ***edited*** in SpecsIntact — they are only for producing a final copy of your specifications in these formats. The files they produce are displayed in the SI Explorer, each type in its own subfolder under the Job.

Once I've processed and printed my Job creating Word files, can I edit them in Word?

Well, yes, ***but*** if you do, they must be edited like any other Word document without any of the SpecsIntact quality controls, and they ***cannot*** be returned to SpecsIntact. If you ever have to go back to that Job or Section in SpecsIntact, any changes you made through Word will be lost. It's best to make any changes in SpecsIntact and then process and print the Job again to produce new Word files.

So, what do you see when you open SpecsIntact?

SpecsIntact has two main components: the SI Explorer and the SI Editor.



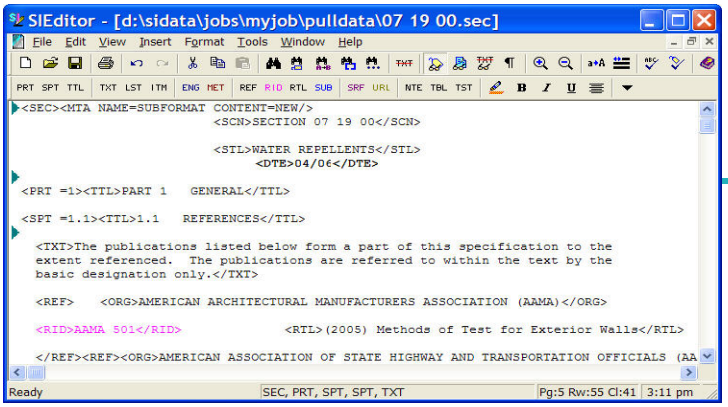
SI Explorer

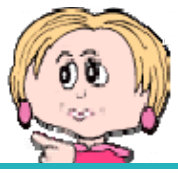
Through the Explorer, you accomplish all the project management, like putting together the specifications you need, running the reports, and producing the final product. It provides a way to visually manage the entire project — or multiple projects at the same time.

Two common features you'll find in SpecsIntact are **drag-and-drop** and **right-clicking**. For example:

- In the Explorer, you can add Sections to your Job by dragging them from either Windows Explorer, a Master or from another Job.
- You can access many common commands by *right-clicking* and choosing them from the pop-up menu.

As you read this guide, this symbol will identify functions that can be alternatively accessed from a right-click menu.





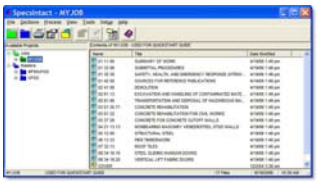
SI Editor

You make changes to your specifications in the **SI Editor**. Although it's much more than a word processor, it does have many of the same standard features with which you are probably already familiar. But in addition, it has specialized toolbars and features to help you work more quickly, and accurately (especially using those all important tags we mentioned earlier). The Editor is opened through the SI Explorer.

SpecsIntact Work Flow

So, just what is the work flow for a Job from beginning to end? Below is a brief explanation of the basic life cycle of a SpecsIntact Job.

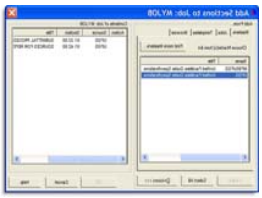
Start



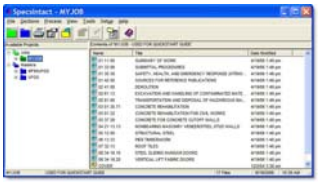
Open the SI Explorer

Click the New Job button on the toolbar.

Enter the information in the New Job dialog box's General and Options Tabs.

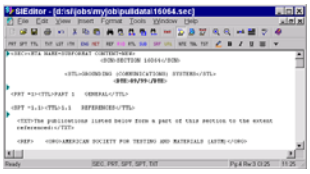


Select Sections you want for your Job using the Add Sections dialog box.

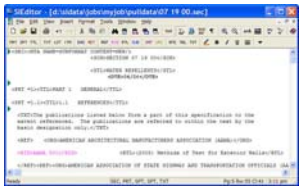


Use the SI Explorer to open each Section in the Editor.

As with most computer programs, there are multiple ways to perform many of the common tasks. This illustration shows one path, outlining the steps involved in using the SpecsIntact system to help you assure a quality end product.



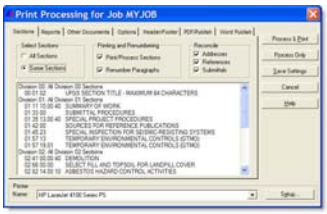
Through the Editor, make all your changes to the Sections.



Use the Process feature in the Explorer frequently as you edit to produce the quality assurance reports.

Use the reports to locate and fix errors in the Sections through the Editor (run the reports again until the corrections are made).

Finish



Use the Process and Print function to produce your finished Job.

Check-list

Before Starting a Job

Some very costly mistakes are rooted in a failure to communicate — especially when starting a new project. If you'll be responsible for starting a new Job and editing the specifications, you need to be able the ask the right questions at the outset. This page contains a list of suggestions and questions offered by our Tech Support staff to get you started on the right foot.

1 Make certain you are using the most recent specifications.
2 Print the Master Table of Contents with Scope to give to your engineer for the project. It can be found in the SI Explorer with the Master Sections, and is named **SCOPE**.
3 The engineer should give you a list of Sections to print so that he can mark up the edits that you will be making through SpecsIntact. At this point, you need to ask the engineer some questions before you begin.

- Will the units of measure for this project be **English, Metric** or **Both**? Should I print the Sections for mark up with both? (See the next box if only one is required.)
- Will you want me to remove any **Tailoring Options** that may exist? (These options are tagged for easy removal when not needed, and are usually specific to a product, region or particular agency—learn more about Tailoring in Chapter 4.)
- Do you require that the editing changes I make be shown as **Revisions**? (When using Revisions, the changes are tagged as added or deleted, but they are not permanent until they are executed in the Section.) This must be determined **before you begin editing.** To learn more about editing with Revisions, refer to **Editing Techniques for Revisions** found in **Chapter 6**.

Now you can print the Sections. It's a good idea to print one at a time and print a **Submittal Register** with *each* for the engineer's review.

1 *Select* the Section in the SI Explorer's right pane.

2 *Click* the **Print** button on the toolbar and the **Print Processing** dialog box will open. The recommended defaults are set for Masters, but if you need to change the setting for **Units of Measure**, *click* the **Options** tab.
3 On the **Reports** tab, check **Submittal Register**.
4 You can change the printer destination at the bottom of the dialog box.
5 *Click* the **Process & Print** button at the top right of the box to send the selected Section and its Submittal Register to the printer.

Support Problems Encountered Commonly

"I've been given a Section in PDF that I'm supposed to add to the Job I'm working on. Can I edit this PDF file in SpecsIntact?"

— Betty in Baltimore

Sorry Betty, but once a Section is published in PDF (or Word) you can't edit that output file in SpecsIntact. What you need for your Job is the actual Section (.sec) file that was used to produce the PDF.

What you learned from this chapter:

- SpecsIntact's not just word processing software, but rather a system that enables both editing and processing of specifications, and includes automated features and quality controls.
- SpecsIntact consists of two main components: the **SI Explorer** and the **SI Editor**. Through the Explorer, you accomplish all the project management and processing, while the Editor allows you to edit the content of the specifications.
- The type of specification files that are edited are **Section** files with a file extension of **.sec**.
- SpecsIntact uses some specific terms that are important to learn so that you can better understand how the software works, how to maintain the proper structure for the Sections, and how to communicate with tech support and others regarding your work.
- The basic steps involved in bringing a project to completion are: creating the Job through the SI Explorer, editing the Sections in the SI Editor, using QA Reports, and finally processing and printing the Job through the SI Explorer.
- The output format for the completed Job can be in the form of the Processed files (**.prn** file extensions), Adobe PDF (.**pdf**), or Microsoft Word (.**doc**). These are output formats only and cannot be directly edited through SpecsIntact. PDF and Word require the corresponding software to produce.

Chapter 2

Setting up your Job

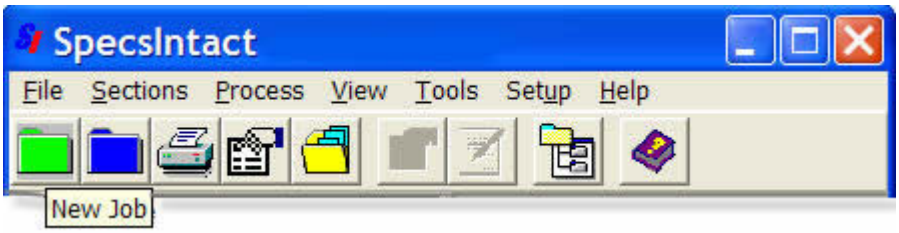
In this chapter you'll learn:

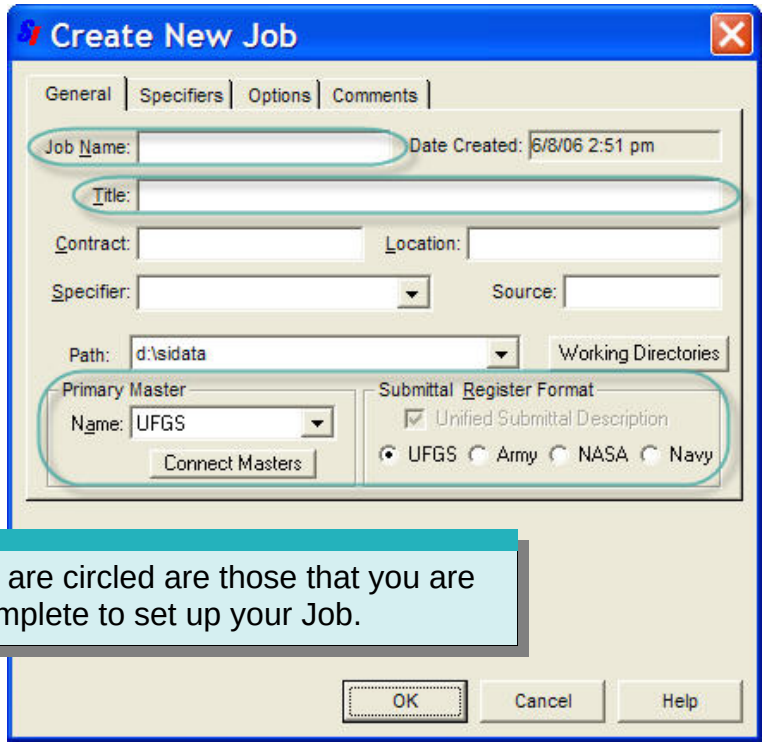
- How to start a new Job.
- How to add Sections to your Job from different sources.
- How to create a new Section using a template.

The time has arrived for you to start your first Job in SpecsIntact!

From the SI **Explorer:**

1. *Click* the **green folder** on the toolbar, or *click* the **File** menu, then **New | Job**.
2. The **Create New Job** dialog box will open.





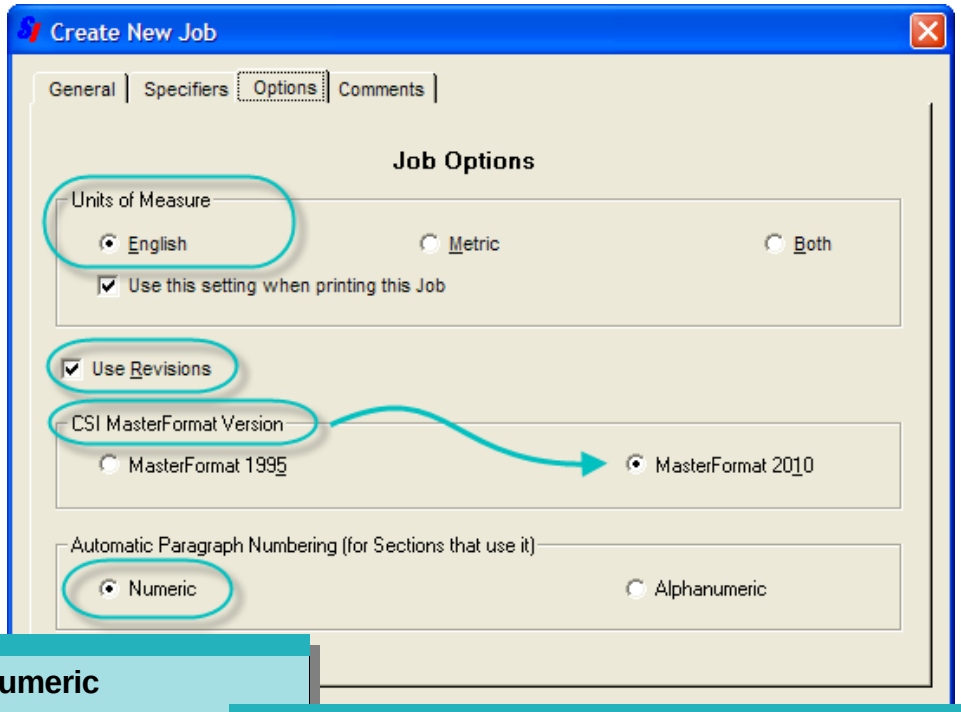
The fields that are circled are those that you are required to complete to set up your Job.

Required Fields

Rules & Restrictions

In addition to the **General** screen, the **New Job** dialog box has three other tabbed screens — **Specifiers, Options** and **Comments.**

The **Options** tab contains the settings that control **Units of Measure, Revisions, the CSI MasterFormat Version** and the **Automatic Paragraph Numbering** for your Job. The default for a new Job is set for **English, Revisions** turned on, **CSI MasterFormat 2010** and with the **Automatic Paragraph Numbering** set as **Numeric.**



Numeric

PART 1 GENERAL

1.1 ARTICLE

1.1.1 Paragraph

1.1.1.1 Subparagraph

Alphanumeric

PART 1 GENERAL

1.01 ARTICLE

A. Paragraph

1. Subparagraph Level 1

a. Subparagraph Level 2

1) Subparagraph Level 3

a) Subparagraph Level 4

The **Specifiers** and **Comments** Tabs do not contain any required fields, but they provide areas you can use to track additional information about your Job.

All these screens can be accessed at any time by *clicking* the **File** menu and *choosing* **Properties**.

Required Fields

Rules & Restrictions

- **Job Name —** identifies your Job in both the SI Explorer and Windows Explorer, and is printed in the top right corner of each page of your Job.
  Rules: The Job Name can't contain any symbols or spaces, and it can't be longer than sixteen characters. It automatically appears in **UPPERCASE** letters. The name can contain numbers.

- **Job Title —** prints in the upper left corner of each page in your Job. Although it is not visible in the SI Explorer, you can display it by placing your mouse pointer over the Job Name in the left pane.
  Rules: The Job Title can't contain more than 64 characters. It can contain numbers, symbols, spaces, and both upper and lower case letters.

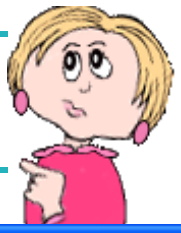
- **Source —** Isn't used as often today, but remains in order to support backward compatibility. The Source indicates the original source of the specifications used in your Job, which can be described in any format. Typical sources used were a CCB Disc # or web download. This gives you a way to keep track of where your Sections originated.
  Rules: This information is only required if the corresponding option is checked on the **Setup** menu | **Options** | **General** tab.

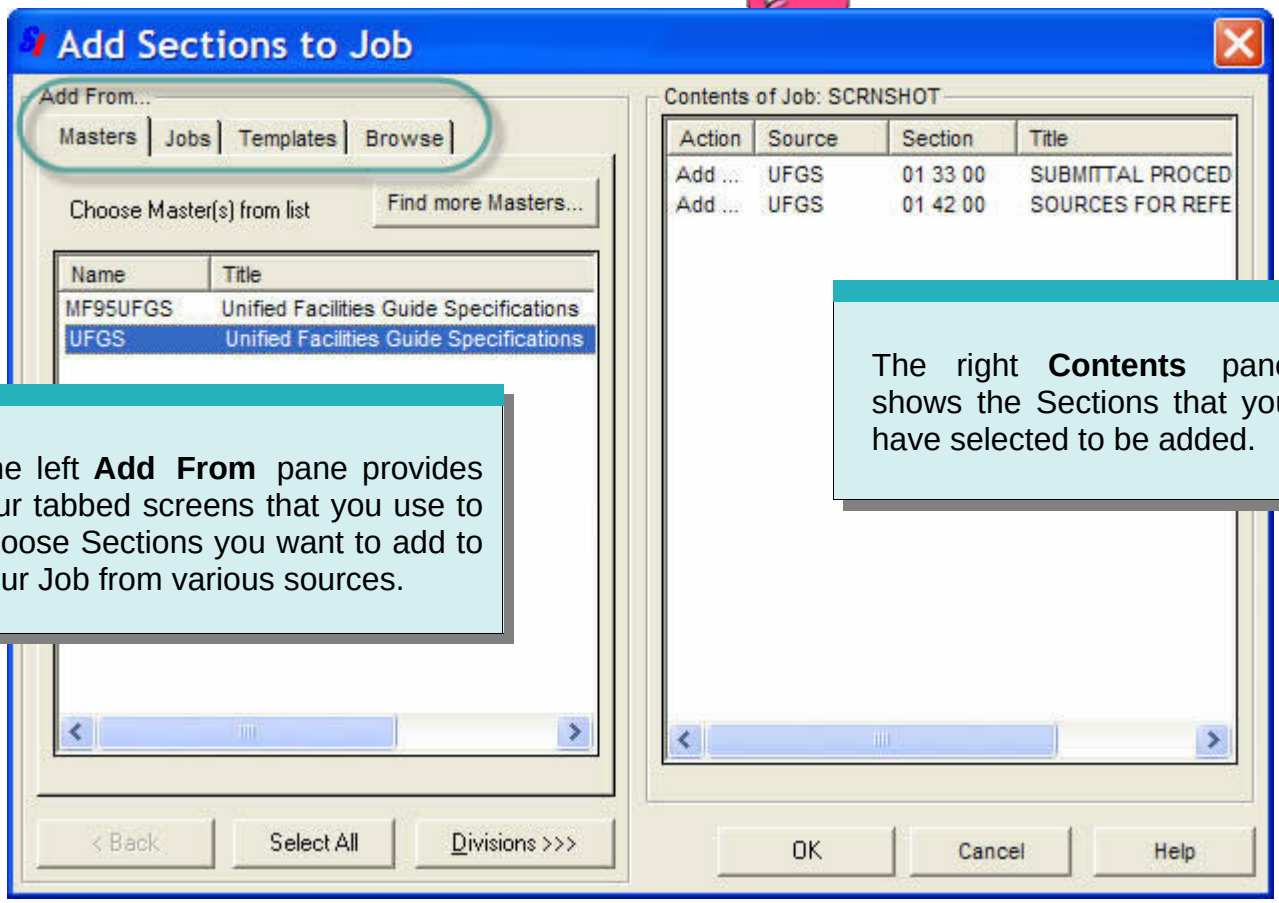
- **Primary Master —** displays the Primary Master chosen during installation. A different Primary can be chosen for the Job from among your currently connected Masters, which are listed in the pull-down menu. You can also connect additional Masters, or change your default Primary Master, by clicking the **Connect Masters** button just below the box.

- **Submittal Register Format —** uses the **Primary Master** you've selected to set the proper Submittal Register Format for your Job. If you want to use an old Submittal Format for one of the agencies, you must *uncheck* the box. If you want to change these designations later, you can do

Adding Sections to Your Job

The **Add Sections** box is made up of two panes.





The left **Add From** pane provides four tabbed screens that you use to choose Sections you want to add to your Job from various sources.

The right **Contents** pane shows the Sections that you have selected to be added.

Why do I see two Sections already listed in the right pane when I haven't added any to my Job yet?

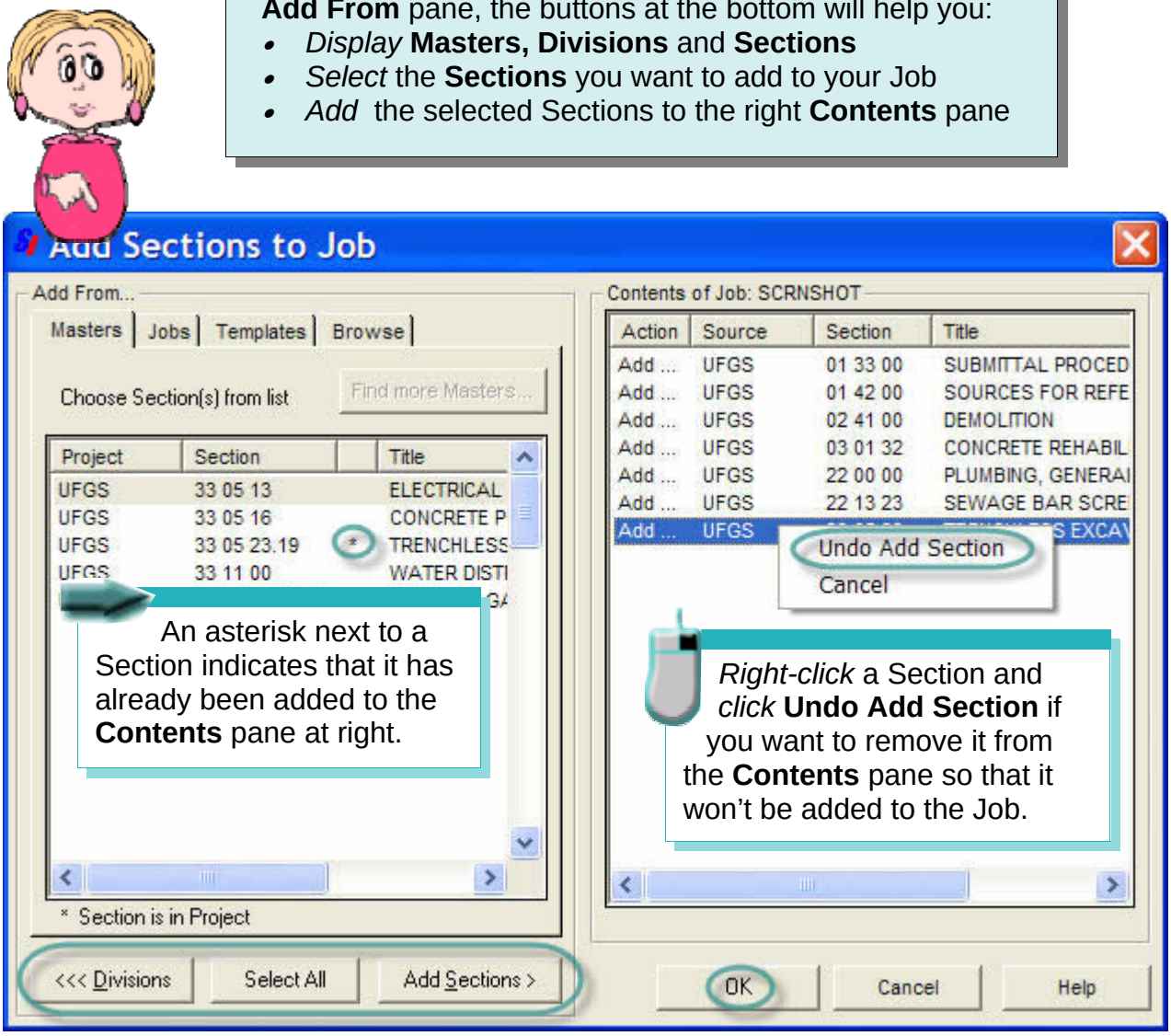
These two Sections -- **01 33 00 Submittal Procedures** and **01 42 00 Sources for Reference Publications** -- are automatically added to every new Job because they are necessary for processing the **Submittals** and **References**.

If you ***don't*** see the **01 33 00 Submittal Procedures** and **01 42 00 Sources for Reference Publications** Sections, then you probably are not using a complete **Unified Facilities Guide Specifications (UFGS) Master**. You should have these two Sections in your Job, so hit the **Cancel** button. Then download the full UFGS Master from the web.

Using the Add Sections Box

When either the **Masters** or **Jobs** tab is selected in the left **Add From** pane, the buttons at the bottom will help you:

- *Display* **Masters, Divisions** and **Sections**
- *Select* the **Sections** you want to add to your Job
- *Add* the selected Sections to the right **Contents** pane



An asterisk next to a Section indicates that it has already been added to the **Contents** pane at right.

Right-click a Section and *click* **Undo Add Section** if you want to remove it from the **Contents** pane so that it won't be added to the Job.

As an alternative to using the buttons, you can *double-click* a **Master**, **Job**, or **Division** in the left **Add From** pane to *display* the contents. *Double-clicking* a **Section** *adds* it to the right **Contents** pane.

When you've finished selecting Sections, *clicking* the **OK** button will add them to your Job, close this box, and return you to the SI Explorer.

Adding Sections Using the Masters or Jobs Tabs

To choose Sections using either the **Masters** or **Jobs** tab, in the left pane:

1 *Click* the Master or Job from which you want to copy Sections, then *click* the **Divisions** button,
-- or *double-click* the Master or Job.

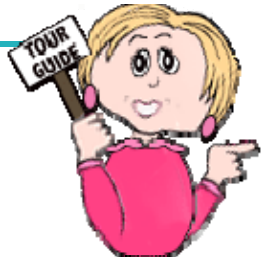
2 *Click* the Division from which you want to copy Sections, then *click* the **Sections** button,
-- or *double-click* the Division.

3 To copy an individual Section, *click* the Section, then *click* the **Add Sections** button,
-- or *double-click* the Section.

You can select multiple Sections by either holding the **Shift** key (to select Sections listed consecutively) or the **Ctrl** key (for multiple non-consecutive Sections) as you click your selections in the **Add Sections** box. You can also use the **Select All** button to add every Section visible in the left pane.

A Word About the Unified Facilities Guide Specifications (UFGS) Master

UFGS Sections can be used in either **Army, Navy** or **NASA** projects. Fully unified Sections in **MasterFormat™ 1995** have a five digit Section name, while **Army**-specific Section names are followed with an **A, Navy** with **N** and **NASA** with an **S**. Fully unified Sections in **MasterFormat™ 2010** can be from three to four level Section names, while **Army**-specific Section names are followed with a **10**, **Navy** with **20, Air Force** with **30,** and **NASA** with a **40** as the fifth level.



The other two tabs in the left **Add From** pane allow you to either create a completely new Section from a **Template**, or Browse to choose Sections from your drives and network (**.sec** documents only).

Using Templates

Creating New Sections and Local Masters

If you need to create a new Section, you can copy one of the **Templates** provided. These templates are formatted outlines to be used as a guide so that the Section you create will have the proper structure. Basic Templates distributed with SpecsIntact are:

Template	Description
UFGSBasic	Unified Facilities Guide Specifications MasterFormat™ 2010 Template for Masters or Jobs. This template contains **minimal** bracketed options.
UFGSBasic_Auto	Unified Facilities Guide Specifications MasterFormat™ 2010 Template for Masters and Jobs. This template contains **minimal** bracketed options and can be used with **Automatically Numbered** (Numeric and Alphanumeric) Jobs or Masters.
UFGSBracketed	Unified Facilities Guide Specifications MasterFormat™ 2010 Template for Masters and Jobs. This template contains numerous bracketed options.
UFGSBracketed_Auto	Unified Facilities Guide Specifications MasterFormat™ 2010 Template for Masters and Jobs. This template contains numerous bracketed options and can be used with **Automatically Numbered** (Numeric and Alphanumeric) Jobs or Masters.
UFGSMSTR95	Unified Facilities Guide Specifications MasterFormat™ 1995 Template for Masters or Jobs.
UFGSMSTR95_Auto	Unified Facilities Guide Specifications **MasterFormat™ 1995 Template** for Masters that can be used with Automatically Numbered (Numeric or Alphanumeric) Masters or Jobs.
SUPP	Used by the software to create the Supplemental Reference File.

These **Templates** give you the proper structure, but while entering your text, you must insert the proper tags (there's that word again!) in the correct locations. You'll learn more about tagging in Chapter 3. Be sure to either overwrite or delete the sample text that explains the content you should enter, which acts as a place holder.

If you've had past versions of SpecsIntact loaded on your computer, older versions of Section templates were not deleted from your system when you installed a newer version of SpecsIntact. In that case, you may also see the following previous versions listed: ARMYOLD, ARMYSECT, NASAOLD, NAVYOLD, NAVYSECT and UFGSMstr. These can be removed by using the SI Explorer's **Tools** menu | **Section Templates** dialog box. *Select* the ones you want to delete from the left side of the box and then *click* the **Delete** button.

Creating New Sections and Local Masters

A good way to manage any new Sections that you need to create is to maintain them in a **Local Master**. This is a Master that you create to hold any Sections that you may want to use again in other Jobs. After you have created your Local Master and edited your specialized Sections, you can add them to any Job in the same way that you add Sections from any other Master.

Creating a **Local Master** is similar to creating a Job.

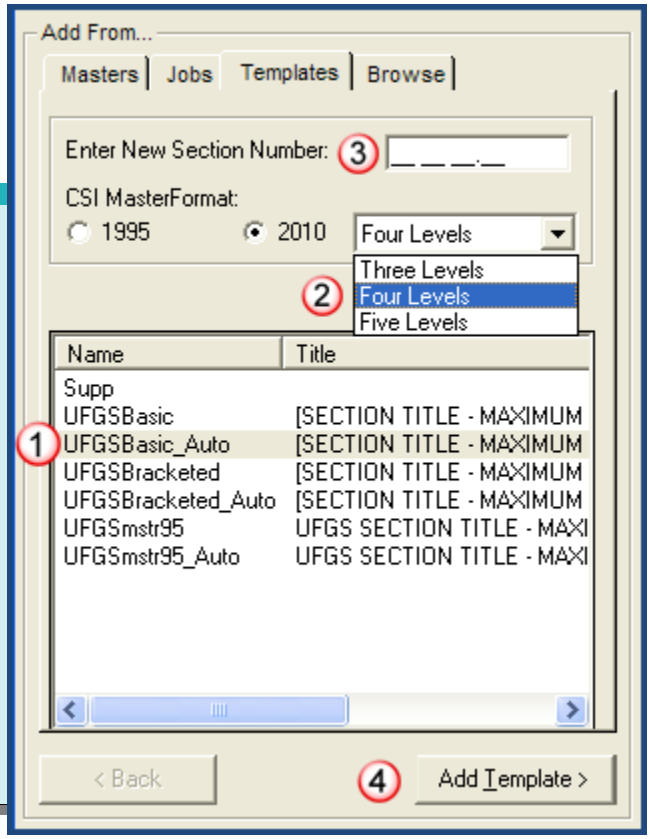
1. *Click* the **New Master** button on the SI Explorer toolbar, or from the **File** menu, *choose* **New | Master**.
2. The **Create New Master** dialog box has two tabs to allow you to define pertinent information about the Master that you are creating. It's advisable to name a Local Master something that is easily recognizable to you, since it will be listed in the **SI Explorer** with your other Masters.
3. *Click* the **OK** button.

You can add Sections to **Local Masters** in the same way that you add them to a Job, or create your own new Sections by *clicking* the **Templates** tab.

Adding Templates Using the Add Sections Box

With the **Templates** tab selected:

1. *Click* the agency **Template** that you want to copy.
2. New Jobs default to CSI MasterFormat 2010, Select Three Levels, Four Levels or Five Levels from the drop-down box.
3. *Enter* a new MasterFormat™ 2010 **Section Number** in the pre-formatted text box (see **Caution** below about assigning a correct number to a new Section).
4. *Click* the **Add Template** button.



When a new Section is created, it is important that your engineer assign a correct number to it. The **CSI MasterFormat 2010 Edition** should be used as a reference when determining an appropriate number. This information is available online at:

http://www.csinet.org/masterformat

You cannot duplicate an existing **Section Title** or **Section Number**.

Revisions ***should not*** be enabled when using a **Template** to create a new Section. Make sure they are ***off***, not just hidden on screen.

Adding a **Template** to your Job in order to create a new Section *should not be confused with* the **Section Templates** command found on the Explorer's **Tools** menu. That function permits you to actually alter your original Templates or create new ones.

Adding Sections Using the Browse Tab

This tab allows you to search your system's drives and network for Sections you want to add. They can be located anywhere, but they must be the **.sec** file type and have the standard **MasterFormat™ 1995** or **MasterFormat™ 2010** Section names. For example, you cannot add a Word document (.doc) using this feature. You also could not add a Section that had been renamed with additional digits/characters, like "01 33 00 **Rev 1"** or the word "**Section**" in the file name (example: "**Section 01 33 00")**. No other file types will be visible using this **Browse** feature.

With the **Browse** tab selected:

1 *Select* the **Drive** you want to search from the pull-down list.

2 In the **Directories** box, *locate* the folder containing the file you want by *double-clicking* the folders to display their contents.

3 In the **Sections** box, *click* the Section you want to copy.

4 *Click* the **Add Sections** button
-- or *double-click* the Section.

If you choose a Section that is already part of the Job, you will be asked if you want to *overwrite* it. If you do, the Section that exists in your Job will be replaced by the one you selected in the **Browse** process.

SPEC

Support Problems Encountered Commonly

"I received a Section by email, and I saved it in a temporary folder. How do I get this Section into the Job I'm working on?"

— Polly in Peoria

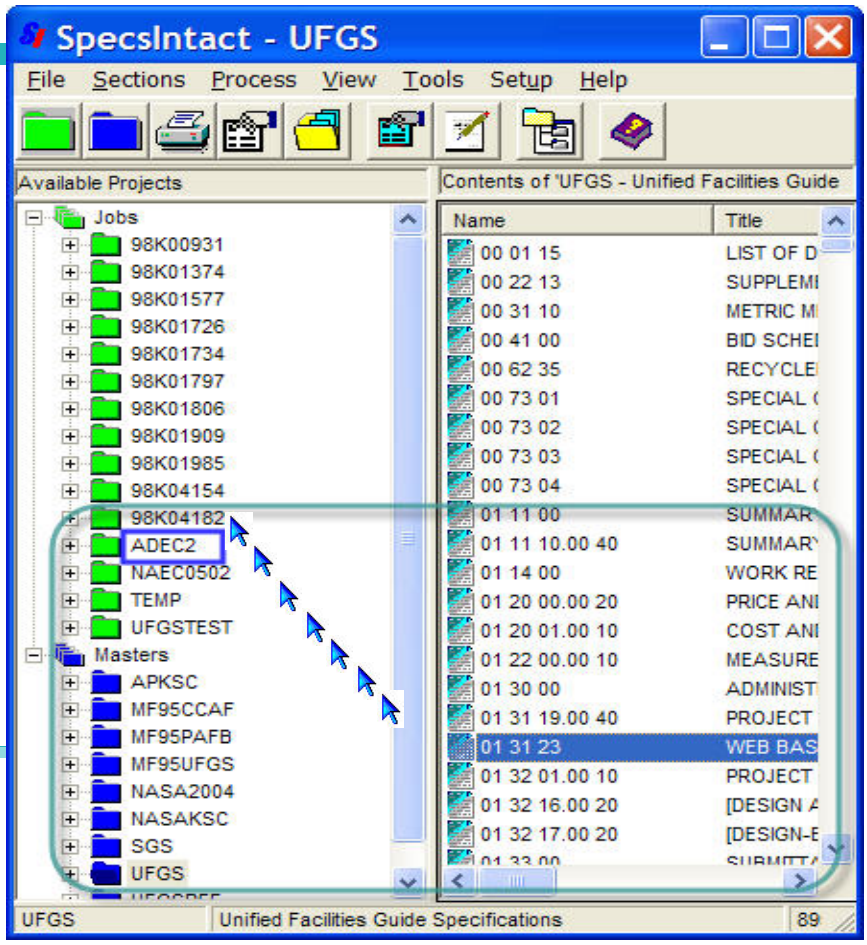
The correct way to add a Section to your Job is through the SI Explorer's **Add Sections** function. After you have saved a Section on your system, use the **Add Sections** box's **Browse** tab to locate the Section and add it to your Job.

Adding More Sections to Your Job

You can always return to the **Add Sections** box at any time to add more Sections to your Job. Just click the button on the SI Explorer's toolbar, or from the File menu, click Add Sections.

Another quick and easy way to add more Sections to a Job is to use the **drag & drop** feature in the SI Explorer.

1. In the left pane, *click* the **Job** you want to *copy from* to display it's contents in the right pane.
2. From the right pane, *select* the **Sections** you want to copy and *drag* them to the **Job folder** you want to *copy to* in the left pane.



What you learned from this chapter:

- How to use the **Create New Job** box to enter the required information to set up a new Job.
- How to use the **Add Sections** box to choose Sections for your Job from Masters or other Jobs.
- How to add a Section **Template** in order to create a new Section.
- How to **Browse** your system drives and network to locate other Section files you want to add to your Job.

Blank

Chapter 3

Section Structure & Tags

In this chapter you'll learn:

- The correct format for a Section.
- Proper tagging methods.

In order for SpecsIntact's automated features to make your work easier and your completed project accurate, you need to understand and follow some important formatting guidelines.

Some of the biggest and most time-costly mistakes made by new users of SpecsIntact come from ignoring the **structure** and **tagging** requirements. If you learn these, your editing tasks will be much easier!

Each **Section** begins with a line that contains the **Section <SEC>** tag followed by one or more **meta <MTA>** tags (this line is not visible when tags are hidden, and it is not printed). It is followed by the **Section Number <SCN>**, **Section Title <STL>** and **Date <DTE>**, each on a separate line as illustrated below. The teal triangle indicates a **Note** that is hidden. When displayed, this Note at the beginning of the Section contains a banner that defines the origin of that Section (more on **Notes** in Chapter 4).

```
<SEC><MTA NAME=SUBFORMAT CONTENT=NEW/><MTA NAME=AUTONUMBER CONTENT=TRUE/>
<SCN>SECTION 01 57 19.02</SCN>

<STL>TEMPORARY ENVIRONMENTAL CONTROLS (GTMO)</STL>
<DTE>01/08</DTE>
```

Character Limits

Section Title
120 Characters

Section Number
14 Characters

Date
5 Characters

Following the Section header information, the body of the Section is broken down into three **Parts** that conform to the Construction Specifications Institute's (CSI) standard three-part format.

Parts & Subparts

Articles, Paragraphs and Subparagraphs

Think of **Section** structure like a numbered outline. Each Section has three major top-levels called **Parts**.

Parts are not automatically renumbered since they are considered inseparable or one in the same, **PART 1 GENERAL**, **PART 2 PRODUCTS** and **PART 3 EXECUTION** will appear within the <TTL> Tags.

An exception: **Division 00** and **Division 01** *do not require* the standard three Parts, but if the **Table of Contents** and **Renumbering** functions are to be used, the **PART** and **Subpart** tags in **PART 1** must be inserted.

Each PART contains a specific type of information:

```
<PRT =1><TTL>PART 1    GENERAL</TTL>
```

PART 1 covers specific **administrative** and **procedural** requirements unique to the Section.

```
<PRT =2><TTL>PART 2    PRODUCTS</TTL>
```

PART 2 describes the **quality of items** required for the Job.

PART Titles are always in UPPERCASE LETTERS.

```
<PRT =3><TTL>PART 3    EXECUTION</TTL>
```

PART 3 details **preparatory actions** and explains **how the products** outlined in PART 2 are to be **used** in the Job.

Each of a Section's three **PARTS** is further divided into three **Subpart** levels (but no more than three!). The Subpart numbers are automatically generated by SpecsIntact and placed inside the beginning Subpart tag as well as on the outside of the Subpart tag. Since the numbers are automatically generated, neither of the numbers can be edited.

Automatic Paragraph Numbering generates the Article number.

The first Subpart level under a **PART** is known as an **Article**. An Article's number is made up of the PART number (either 1, 2 or 3) followed by a period and the two-digit Article number. In addition, the title must be UPPERCASE and surrounded by **Title tags <TTL>**.

Here's what an Article under **PART 1** would look like:

```
<SPT =1.1>1.1    <TTL>REFERENCES</TTL>
```

Parts & Subparts

Articles, Paragraphs and Subparagraphs

Character Limits

Article
71 Characters

Paragraph
68 Characters

Subparagraph
60 Characters

The second and third level **Subparts** follow the same numbering outline — adding a period and a number for each level, with their titles surrounded by **Title tags <TTL>** — but they appear in **Title Case Letters** instead of UPPERCASE.

A second level Subpart is called a **Paragraph**. An example of a Paragraph under Part 2 would look like this:

```
<SPT =1.5.1>1.5.1 <TTL>Properties of Sections</TTL>
```

A third level Subpart is called a **Subparagraph**. An example of a Subparagraph under Part 3 would look like this:

```
<SPT =2.3.1.1>2.3.1.1 <TTL>Cellular Metal Floor Deck Units</TTL>
```

Although you can add a fourth, fifth and sixth level subpart, the agencies discourage you from using them. If additional levels are needed under a Subparagraph, then use letters and numbers (surrounded by <LST> and <ITM> tags) , as sited in the UFC 1-300-02, Appendix A and illustrated below:

1.1.1.1 Subparagraph
a. Text
(1) Text
(a) Text
1. Text

These extra levels *will not* be renumbered by SpecsIntact the way Subpart levels are, so if you make any changes, you must renumber them manually.

Caution: Use sparingly!

When switching between **Numeric** and **Alphanumeric** Numbering this format will not translate to the correct format and will not automatically renumber.

This is because a combination of List **<LST>** and Item **<ITM>** tags are used and not supported by the **Alphanumeric** format.

By now, you may be wondering about those funny looking little angle brackets **< >** with the letters in between. User, meet the **Tags**! As we mentioned earlier, without the tagging, SpecsIntact can't do its job. Everything, E-V-E-R-Y-T-H-I-N-G in SpecsIntact is tagged. The Editor gives you a special row of buttons for inserting the tags — they are not typed manually. Without proper tagging, the built-in quality assurance reports and Job processing cannot work properly.

In the next few pages, we'll give you some foundational information to help you understand and use tags correctly. The illustration on the next page shows the structure of a PART with tags and numbering.

Section Structure

Parts, Subparts and Tags

```
<PRT =1>PART 1   GENERAL
    <SPT =1.1> 1.1   (ARTICLE)
        <SPT = 1.1.1>1.1.1          (Paragraph)
            <SPT = 1.1.1.1>1.1.1.1          (Subparagraph)
            </SPT = 1.1.1.1>                (End of Subparagraph)
            <SPT = 1.1.1.2>1.1.1.2          (Subparagraph)
            </SPT = 1.1.1.2>                (End of Subparagraph)
            <SPT = 1.1.1.3>1.1.1.3          (Subparagraph)
            </SPT = 1.1.1.3>                (End of Subparagraph)
            <SPT = 1.1.1.4>1.1.1.4          (Subparagraph)
            </SPT = 1.1.1.4>                (End of Subparagraph)
        </SPT = 1.1.1>      (End of Paragraph)
    </SPT =1.1>         (END OF ARTICLE)
    <SPT =1.2> 1.2   (ARTICLE)
        <SPT = 1.2.1>1.2.1          (Paragraph)
            <SPT = 1.2.1.1>1.2.1.1          (Subparagraph)
            </SPT = 1.2.1.1>                (End of Subparagraph)
            <SPT = 1.2.1.2>1.2.1.2          (Subparagraph)
            </SPT = 1.1.1.1>                (End of Subparagraph)
            <SPT = 1.2.1.3>1.2.1.3          (Subparagraph)
            </SPT = 1.2.1.3>                (End of Subparagraph)
            <SPT = 1.2.1.4>1.1.1.4          (Subparagraph)
            </SPT = 1.2.1.4>                (End of Subparagraph)
        </SPT = 1.2.1>      (End of Paragraph)
    </SPT =1.2>         (END OF ARTICLE
</PRT =1>    (END PART 1)
```

Notice that **PARTS** have their own tag — **<PRT>** — but **Articles**, **Paragraphs** and **Subparagraphs** all share the same **Subpart** tag — **<SPT>**. The way you can tell what level a Subpart tag represents is by looking at the level number contained inside the tag, such as **<SPT =1.1.2>**. This would represent **PART 1**, **Article 1**, **Paragraph 2**.

Tags

The Keys to SpecsIntact

You can't successfully use SpecsIntact without understanding and using the tags correctly — so don't even try! In the long run, taking time now to learn about tagging will pay off in the long run.

The tagging system used in SpecsIntact is similar to its better-known relative, HTML (Hypertext Markup Language) that makes web pages display correctly in your web browser. In much the same way, SpecsIntact uses tagging to distinguish between all the different elements in a Section.

On the next page, we've listed some basic tagging rules that you should keep in mind. But before we get into those, below is the basic anatomy of a tag.

It is possible to view a Section on your screen without viewing the tags, but when editing, you should **always** have the tags visible to avoid big problems. We'll discuss this more in Chapter 5.

Most tags come in pairs — the beginning and ending tags encompass the information that they define.
Notice that the end tag is distinguished by a forwardslash

/

within the tag.

<TAG>information to be tagged</TAG>

While the tags most immediately surrounding information identify it, that information is also contained within other higher level tags that have a relationship to it as well.

Think of it like a family tree: Mary is *tagged* as <wife> inside the <marriage> tags, but she is also tagged with <mom> tags, too. Outside of the marriage tags, in her extended family, she carries other tags like <daughter>, <sister>, <grand-daughter> and so on. So it is with tagged elements in your specifications: a measurement, for instance, may also be within tags for text, Subparagraph, Paragraph, Article, Part, and ultimately, Section.

With tagging relationships in focus, your editing will go more smoothly!

Tags Rules

Some Basics

Every set of tags either completely encompasses another set, or the set is completely contained within another set of tags. For example:

TXT tags inside

<TST><TXT>text text text</TXT><TST>

TST tags outside

OR

TST tags inside

<TXT><TST>text text text</TST></TXT>

TXT tags outside

BUT NOT

<TST><TXT>text text text</TST></TXT>

TST and TXT tags are never interlinked

Tags are not typed, they are inserted using either the corresponding button on the tags bar of the **SI Editor**, or by using the **Insert** menu and choosing the tag you want from the drop-down box. Inserting tags using these methods insures that they are placed correctly and that both beginning and ending tags are used.

- All content in a Section must be tagged.
- Every **Section** must begin with a **<SEC>** tag and end with a **</SEC>** tag.
- The <SEC> tag is followed by a meta tag line: **<MTA NAME=SUBFORMAT CONTENT=NEW/>**
- All three **Parts** must begin with a **<PRT =#>** tag and end with a **</PRT =#>** tag.
- Every **Article** must begin with a **<SPT =#.#>** tag and end with a **</SPT =#.#>** tag.
- Every **Paragraph** must begin with a **<SPT =#.#.#>** tag and end with a **</SPT =#.#.#>** tag.
- Every **Subparagraph** must begin with a **<SPT =#.##.#.#>** tag and end with a **</SPT =#.#.#.#>** tag.

Typical Part, Subpart and Title tag lines look like this:

<PRT =1><TTL>**PART 1 GENERAL**</TTL>

Notice PART 1 precedes the title since they are inseparable.

<SPT =1.1>**1.1** <TTL>REFERENCES</TTL>

<SPT =1.1.1>**1.1.1** <TTL>General Requirements</TTL>

</SPT= 1.1.1>**</SPT =1.1><SPT =1.2>**<u>**1.2**</u> <TTL>SUBMITTALS</TTL>

The end tag for an **Article** appears when the numbering goes to the next Article number in sequence. This is also true for Paragraphs and Subparagraphs.

</SPT =1.2>**</PRT =1><PRT =2>**<TTL>PART 2 PRODUCTS</TTL>

The end tag for a **Part** appears just prior to the beginning tag for the next Part, and on the same line. ***Do not*** add extra lines between them.

<SPT =2.1>**2.1** <TTL>ALUMINUM ALLOY PRODUCTS</TTL>

<SPT =2.1.1>**2.1.1** <TTL>Aluminum Finishes</TTL>

<SPT =2.1.1.1>**2.1.1.1** <TTL>Anodic Coating</TTL>

</SPT =2.1.1.1></SPT =2.1.1></SPT =2.1></PRT =2><PRT =3><TTL>PART 3 EXECUTION</TTL>

All end tags for **Articles**, **Paragraphs**, and **Subparagraphs** must appear on the same line before the end tag for the **Part** and the beginning tag for the next Part.

Tags

Definitions

The tags used in SpecsIntact are listed below in alphabetical order, followed by a brief description of each. Some, including their content, are color coded on screen for easier recognition. These colors can be toggled on or off using the Editor's **View** menu.

ADD	Additions (Revisions) - Green
AST	Asterisk
ATT	Section Attachment
DEL	Deletions (Revisions) - Red
CHG	Change Notice
DOC	Document File
DTE	Section Date
END	End of Section
ENG	English - Dark Blue
EOD	End of Document
HDR	Header
HL1	Underline
HL2	*Italic*
HL3	**Bold**
HL4	Center
HLS	Screen Highlight - Orange
INC	Include
ITM	Item
LST	List
MET	Metric - Dark Red
MTA	Unified Submittal Format and Automatic Paragraph Numbering
NED	Need Lines
NPR	Note Paragraph
NTE	Note
OAD	Organization Address
ORG	Organization
OTH	Other File
PGE	Page Break
PRA	Preparing Activity
PRT	Part
REF	Reference
RID	Reference Identifier - Pink
RTL	Reference Title
SBM	Submittal
SBS	Subscript
SCN	Section Number
SCP	Section Scope
SEC	Section
SPS	Superscript
SPT	Subpart
SRF	Section Reference - Violet
STL	Section Title
SUB	Submittal Key - Blue
TAB	Formatted Table
TAI	Tailoring Option - Teal
TBL	Table
THD	Table Header
TOC	Table of Contents
TST	Test Requirements
TTL	Title
TXT	Text
URL	Hyperlink - Dark Yellow

Entity & Tailoring Tags

Just like every family has some unique individuals, the SpecsIntact tagging family has some as well.

Tags that carry certain attributes and perform functions are known collectively as **Entity** tags. Their functions vary widely, and they are included in the chart on the previous page, but here are a few examples:

When inserting a **Note**, instead of typing a line of asterisks, you insert the **<AST/>** tag to represent a line of asterisks. When you display the Notes and tags on your screen, you will see the **<AST/>** tag instead of the asterisk line. When you display Notes without tags visible, you will see a line of asterisks at the top and bottom of the Note. So in this case, the tag isn't surrounding content, it is actually inserting content — the line of asterisks.

Other Entity tags are:

- **<MTA/>** Is a dual purpose tag that designates that a Section contains the Unified Submittal Format and/or uses Automatic Paragraph Numbering.
- **<END/>** represents the —END OF SECTION— line.
- **<EOD/>** used only for the Division 00 documents to represent End of Document.
- **<INC/>** was once used only in Masters (primarily by Navy) to include their standard cover in every Section. Although no longer used, the tag remains due to backward compatibility.

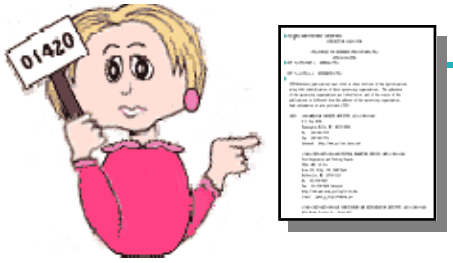
Tailoring Options

Designated by the **<TAI>** tag, Tailoring Options can be a bit confusing, but they're great time savers. They are used by the writers of the Master specifications to set aside information that you can remove completely from the Sections if it doesn't apply to the project on which you are working. By placing it within **<TAI>** tags, they've made it easy for you to remove this information without manually editing it out of each Section in the entire Job. For this reason, tailoring is often referred to as pre-editing tool. By using the built-in features of SpecsIntact, it is possible to remove the contents of **<TAI>** tags from individual Sections, or from an entire Job, without ever opening the Sections in the Editor. When creating a new Job or Master the Tailoring Options Dialog box will appear so you can choose the Tailoring Options you wish to be removed. Additionally, the SI Editor's Tailoring Dialog box will appear when opening Sections that contain Tailoring Options. You'll learn more about using Tailoring

When using **Tailoring Options** in order to pre-edit the Section in both the SI Explorer and the SI Editor and you are using **Revisions** the Tailoring Options that are being removed ***will not*** be redlined.

Tags

References



01 42 00 Sources for Reference Publications Section - contains the following tagged information for all the References found in the Master text:

- **Reference <REF>** tags surround the information and other tags for each reference publication listed.
- **Organization <ORG>** tags enclose the name of the sponsoring organization.
- **Organization Address <OAD>** tags surround the address, phone, fax, email and Internet information for each sponsoring organization.

SpecsIntact helps automate the use of **References** in your Job. This great time saver is controlled by the use of a family of tags that identify the Reference-related elements, a listing of References within each Section, and a Section listing all referenced publications. Your goal at the end is to have these lists reflect only the References actually used within your Job — a task SpecsIntact will accomplish for you during processing through **Reconciliation** — as long as the information is inserted and tagged properly.

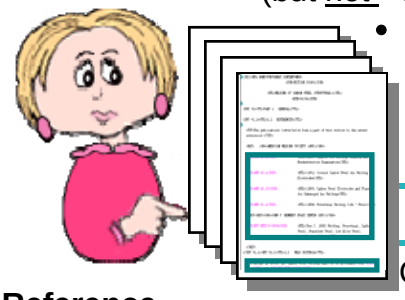
We'll cover more on adding References in Chapter 4, and describe how the Processing function works in Chapter 5, but for now, here are a few basics:

The content of the **References** cited in the Sections is considered part of the specifications. The **01 42 00 Section** supplies contractors with information they need to order the necessary referenced publications.

In Chapter 2, we mentioned the two Sections that are automatically added to every Job because they are necessary for processing your finished specifications. One of them — **01 42 00 Sources for Reference Publications Section** — lists all the sponsoring organizations (with addresses) for publications that are referenced in the Master text. During processing, this list will be used to check the Reference Publications.

The **Reference Article** of each Section (found in Part 1) contains:

- **<REF>** and **<ORG>** tagged information (but not <OAD>)
- Reference Identifiers **<RID>**
- Reference Titles **<RTL>**

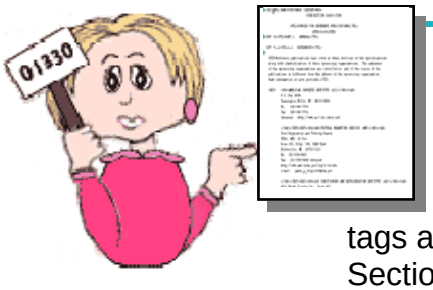


Within each Section, a listing of References used in that Section is contained in **Part 1** within the **Reference Article** (remember that an Article is a first level Subpart). You can add to this list, but you shouldn't remove any References, since any you don't use in your final text will be automatically excluded from the output files you produce during processing.

Outside the Reference Article, you will ***only*** have **Reference Identifiers <RID>**.

Tags

Submittals



The **Submittal Procedures Section** contains the following tagged information:

- **Submittal <SBM>** tags are found only in this Section, and completely surround the information and tags for each **Submittal Description** and **Submittal Definition**.
- **Submittal Descriptions (SD Numbers)** and **Titles** are surround by **<SUB>** tags, which are within a set of **<TXT>** tags.
- Submittal definitions are surrounded by **List <LST>** tags.

SpecsIntact also automates the use of **Submittals** in your Job, which brings us to the second of the two Sections necessary to process a finished Job: the **01 33 00 Submittal Procedures Section**. This Section lists all the **Submittal Descriptions** — as well as pertinent instructions. Submittals fall into one of eleven assigned **Submittal Descriptions** (containing numbers and names) that should not be altered.

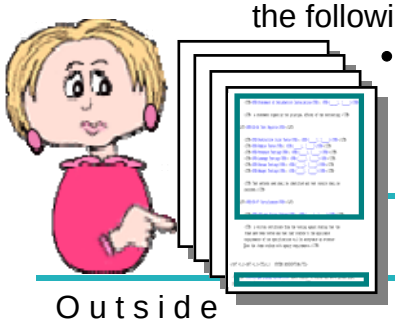
Submittal Items are each listed under their corresponding **Submittals Description** in the Section's **Submittal Article** (within Part I). Only Submittal Items actually used elsewhere within the Section should be listed in the Submittal Article, and they must be identical and tagged properly to enable the system to process the information correctly. The Submittal Article can be edited.

Submittals are items — such as samples or drawings — that must be provided by the contractor. The **Submittal Register** form can be generated from your Job to show all the Submittals in a grid format.

In addition to the information contained in the Job's Sections, another document — called the **Submittal Register** — can be produced when printing a Job if the Submittals have been correctly tagged. It lists the materials, products or items for each Submittal, and cites the **Section** and **SubPART 1**ocation where the Submittal is mentioned in the Job's text.

The **Submittal Article** of each Section (found in Part I) contains the following tagged information:

- **<LST>**
- **<SUB>**
- **<ITM>**



Outside the Submittal Article, you will ***only*** have **<SUB>** tags.

You will learn more about tagging and formatting Submittals in Chapter 4, and in Chapter 6 we'll cover more about producing the Submittal Register.

Support Problems Encountered Commonly

"I just finished editing six Sections of the first Job I've ever done in SpecsIntact. Now my co-worker (who's used SpecsIntact in the past) says I should have been viewing what she called "the tags" while I was editing. I got confused by all those things mixed in with the text so I did my editing without displaying them on the screen. Was this a mistake?"

Dottie in Dallas

Yes Dottie, that was a mistake. Without the tags visible, your cursor may not be located where you think it is and you may be deleting necessary information and tagging. It's vitally important that your tagging is correct so that all the elements within your Sections are identified properly. You will need to correct any tagging errors in those six Sections, and from now on, ***always*** edit with the tags visible on your screen.

What you learned from this chapter:

- Sections have three top levels known as Parts.
- Each Part can have no more than three lower levels known as Subparts.
- The three SubPART 1evels are called Articles, Paragraphs, and Subparagraphs.
- Parts and Subparts have specific numbering and title requirements.
- All information in a Section must be tagged to be identified. SpecsIntact has many different types of tags for this purpose.
- Most tags come in pairs with both a beginning and ending tag that encompass the information they identify.
- References and Submittals each use a family of tags to identify their elements and assist in processing.
- You should always display the tags on your screen when editing to avoid costly errors.

Chapter 4

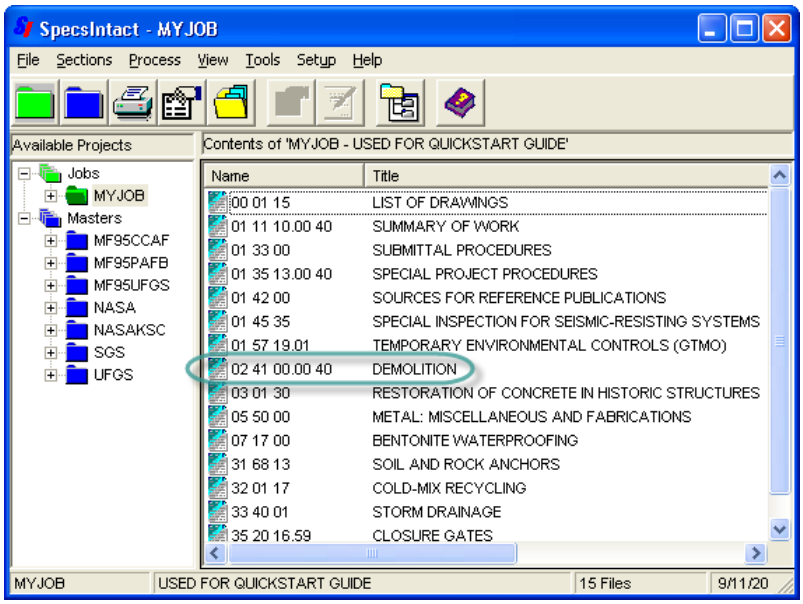
Editing Your Job

In this chapter you'll learn:

- Pre-editing using Tailoring Options.
- How to open a Section in the SI Editor.
- Toggling on-screen elements using the Toolbar.
- Inserting tags using the Tags Bar.
- How to use Revisions while editing.
- How to use Formatted Tables while editing.
- Shortcuts for removing tags and text.

The time has finally arrived! Armed with the knowledge you've gained, you are now ready to tackle editing your first Section!

Taking the printed Sections that have been marked-up by your engineer, you can now use the **SI Editor** to make those changes to the Section files in your Job. To do so, you always start by opening the Job in the **SI Explorer**.



From the SI **Explorer**:

1 *Click* your **Job** folder in the left pane to display the Sections it contains in the right pane.

2 Use one of the following to open the Section you want to edit in the SI Editor:

— *Click* the Section once in the right pane, then *click* the **Edit** button on the toolbar,

OR

— *Click* the Section once in the right pane, then *click* the **Sections** menu and choose **Edit**,

OR

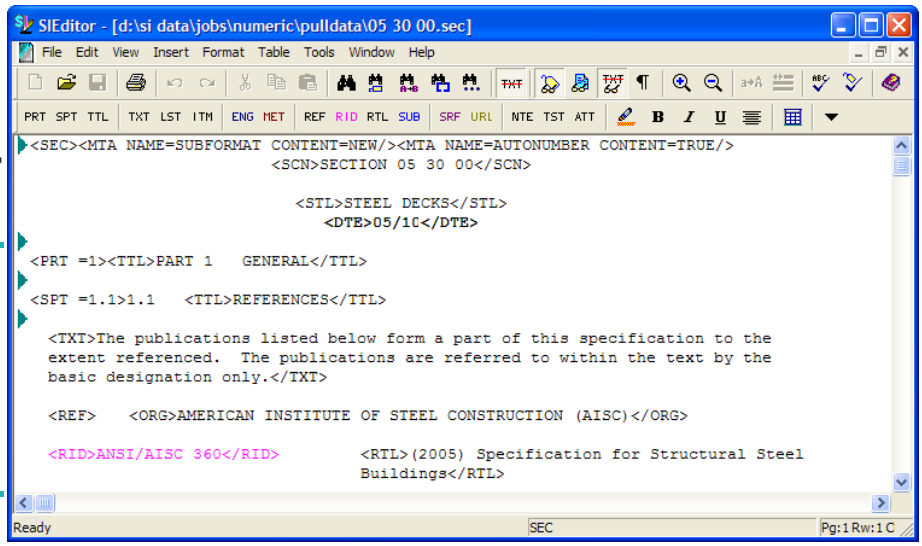
— *Double-click* the Section in the right pane.

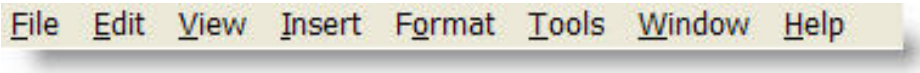
Using any of these methods, the Section you select will open in the **SI Editor**.

Welcome to the SI Editor

Learning Your Way Around

You can access all the functions you need to do your editing by using the Editor's menus, **Toolbar** and **Tags Bar**.





Many common commands are accessible from both the menus and the toolbar.

A number of them are familiar Windows-standard functions — such as cut, copy, and paste.

Others — such as the commands to show or hide screen elements like tags, notes and revisions — are specific to the **SI Editor**.

Using a button on the tags bar inserts a pair of the selected tag. You can either insert the tags then type the information between them, or type the information first, select it, then click the tag button to insert the tags around it.

The tags bar can be customized — you can display the tags you use frequently by *clicking* the down arrow at the end of the bar and checking or unchecking the tag name.

Always edit with the tags visible on the screen. You can turn tags off to check the formatting, but when you make any changes, you must see the tags. Following this rule will prevent major errors.

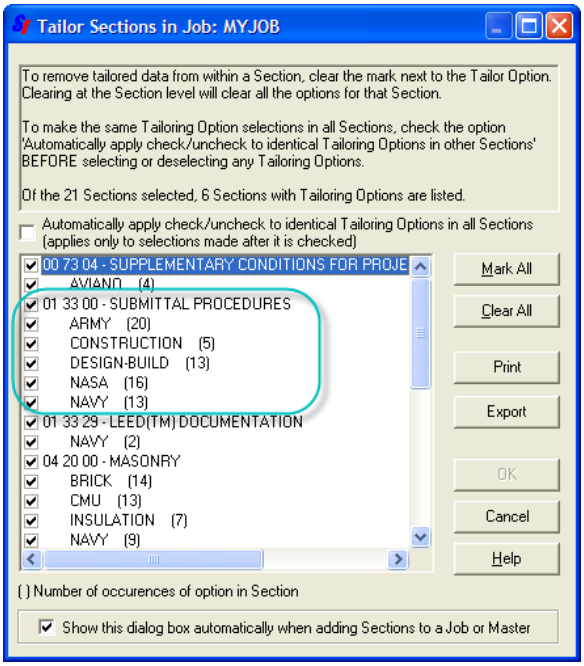
Use this button to toggle the tags off and on.

Tailoring Options

Pre-Editing Your Job

In Chapter 3, we introduced you to the concept of **Tailoring** — a way to pre-edit Sections when the Master text preparers have marked information with Tailoring **<TAI>** tags. If Sections contain **Tailoring Options**, you can choose to *leave* or *remove* all the information within the <TAI> tags — either throughout the entire Job, or in selected Sections — without opening any of the Sections in the Editor. This eliminates the need to manually edit this information in each Section.

It's especially important that you understand Tailoring since it is displayed by default when creating a new Job or Master. It is also important to know the **01 33 00 Submittal Procedures Section** does contain agency-specific Tailoring Options that should be taken care of as soon as possible.



1. You can Tailor an entire **Job** by using the **SI Explorer**'s **File** menu | **Tailor** command.
2. You can Tailor selected **Sections** by using the **SI Explorer**'s **Sections** | **Tailor** command.

If you open a Section in the SI **Editor** that has **Tailoring Options**, the Tailoring Options dialog box will appear automatically so you can choose which options to show or hide. The Tailoring Options can also be chosen from the **Editor's View** menu. There is an Option on the **Tools** menu | **Options** | **Save** tab where you can indicate what you want the software to do with Tailoring Options that are *hidden* when you close a Section — retain them, delete them, or warn before deleting. The default is set to warn before deleting.

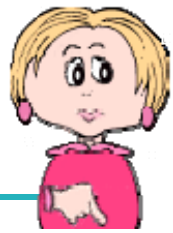
If you do not want to permanently delete the Tailoring Options from the Section make sure to select "No" when prompted.

Viewing a Section

Tags, Notes, & Units of Measure

By looking at this example, you can see the advantage of toggling the tags off to check the formatting.

Just remember to turn them back on before you begin to edit again!



When you look at a Section with the tags hidden, only the content is visible. In this example, you see only the Section Number, the Section Title, and the Date. The teal triangle at the left margin indicates that there's a Note hidden as well.

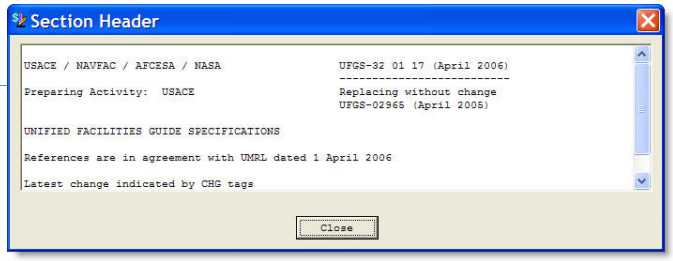
```
SECTION 32 01 17

COLD-MIX RECYCLING
04/06
```

Here is the same information with the tags displayed. As you can see, the Section and meta tags are now visible, in addition to the tags that surround the Section Number, Section Title, and Date. The teal triangle indicates that the Note is still hidden.

```
<SEC><MTA NAME=SUBFORMAT CONTENT=NEW/>

<SCN>SECTION 32 01 17</SCN>

<STL>COLD-MIX RECYCLING</STL>
<DTE>04/06</DTE>
```

Use this button to view or hide the contents of <u>all</u> the Notes in the Section. When viewed, the Note text appears in bold and set apart from the other text by a row of asterisks above and below.

To view the contents of a single hidden Note, *click* the teal triangle and the Note contents will display in a pop-up box.



Units of Measure

You can determine which units of measure (**English, Metric or Both**) you want to display on the screen while editing by using the **Options** tab of the New Job dialog box. However, if you want to change the display while editing, you can do so from the Editor's **View** menu. Keep in mind you ***<u>do not</u>*** need to remove the type of measurements and tags that you do not use. When the Job is processed and printed, it will only contain the type of measurement that was chosen.

Begin Editing

While Tags Are Visible

This is it! You're sitting at your computer. You have the first Section you want to edit open on-screen in the Editor. You have the printed copy that has been marked with changes by the engineer. You have determined whether or not you are required to show the additions and deletions by using the Revisions feature. The time has come to edit!

So, with the tags visible on-screen, you locate the first change indicated in your marked copy.

Here's an exercise you can do to help you understand why it is vitally important to only edit when the tags are displayed.

1 **Use the toggle tags button to hide the tags on screen.**
2 **Place your cursor just to the left of a Part.**

```
PART 2    PRODUCTS
```

3 **Now use the toggle tags button again to display the tags on screen and look at where your cursor is sitting.**

```
</SPT =1.5></PRT =1><PRT =2><TTL>PART 2    PRODUCTS</TTL>
```

As you can see from this illustration, the cursor is not to the left of the Part tag as you might have expected, but is actually to the left of the ending tag for the previous Subpart.

Begin Editing

Inserting Articles, Paragraphs & Subparagraphs

Let's begin by learning how to add Articles, Paragraphs and Subparagraphs. As you learned earlier in this chapter each of these share the same subpart tag **<SPT>**. When adding new subparts, the outcome will depend on the placement of the cursor, so let's get started!

We will begin by adding a new Article in Part 3, which we want to be **3.1.**

Since tagging varies depending on whether you are at the beginning of a **Part** or at the bottom we'll illustrate different scenarios for inserting Articles, otherwise known as subparts!

Adding a New Article at the Beginning of a Part!

Place the cursor to the left of the **beginning Subpart tag** for **3.1,** then press the **SPT** button on the Tags Bar.

Before:

```
<SPT =3.1>3.1   <TTL>EXISTING CONDITIONS</TTL>
```

Place Cursor Here

After:

```
</SPT =2.5.2></SPT =2.5></PRT =2><PRT =3><TTL>PART 3   EXECUTION</TTL>

<SPT =3.1>3.1   <TTL>Sub Title</TTL>

  <TXT>Text</TXT>

</SPT =3.1><SPT =3.2>3.2   <TTL>EXISTING CONDITIONS</TTL>
```

Notice in the illustration above, the new Subpart is now **3.1**, whereas "Existing Conditions" becomes **3.2**.

Begin Editing

Inserting Articles, Paragraphs & Subparagraphs

Now that we have learned how to add a new Article at the beginning of a Part, let's learn to how to insert a new Article at the end! The new Article will be **3.9**.

Adding a New Article at the End of a Part!

Place the cursor between the **ending Subpart tag** for **3.8** and the **ending Subpart tag** for **Part 3**, then press the **SPT** button on the Tags Bar.

Before:

```
</SPT =3.8></PRT =3>     <END/>
```

Place Cursor Here

After:

```
</SPT =3.8><SPT =3.9>3.9   <TTL>Sub Title</TTL>

  <TXT>Text</TXT>

</SPT =3.9></PRT =3>     <END/>
</SEC>
```

Remember Articles, Paragraphs and Subparagraphs all share the same **SPT** tag!

We've learned how to add an Article at the beginning and end of a Part, now it's time to learn how to add a new Paragraph! Adding new subparts will become easier as you continue to build your skills, so let's keep going!

Adding a New Paragraph!

Place the cursor to the left of the **ending Subpart tag** for **3.9**, then press the **SPT** button on the Tags Bar.

Before:

```
</SPT =3.9></PRT =3>     <END/>
</SEC>
```

Place Cursor Here

After:

```
<SPT =3.9.1>3.9.1    <TTL>Sub Title</TTL>

  <TXT>Text</TXT>

</SPT =3.9.1></SPT =3.9></PRT =3>     <END/>
</SEC>
```

If for some reason the numbering didn't reflect the subpart number it should have, use the undo button on the toolbar and try again!

Your training is almost complete! The last level to learn is the insertion of a subparagraph.

Adding a New Subparagraph!

Place the cursor to the left of the **ending Subpart tag** for **3.6.1**, then press the **SPT** button on the Tags Bar.

Before:

```
</SPT =3.6.1><SPT =3.6.2>3.6.2   <TTL>Adhesively Bonded Systems</TTL>
```

Place Cursor Here

After:

```
<SPT =3.6.1.1>3.6.1.1   <TTL>Sub Title</TTL>

  <TXT>Text</TXT>

</SPT =3.6.1.1></SPT =3.6.1><SPT =3.6.2>3.6.2   <TTL>Adhesively Bonded Systems</TTL>
```

The Unified Facilities Guide Specifications Format Standard UFC 1-300-02 provides an example method in which the subpart numbering can extend past the fourth level. Use this method sparingly and with caution. When switching between Numeric or Alphanumeric this format will not translate to the correct format and will not automatically renumber.

This is because a combination of List **<LST>** and Item **<ITM>** tags are used and not supported by the Alphanumeric format.

Deleting Information

If you delete some of the information between existing tags, don't delete the tags. An example would be:

<TXT>Floor covers shall be maintained in good condition.</TXT>

to

<TXT> Floor covers shall be maintained.</TXT>

When you remove the words — "in good condition" — you must be careful not to remove the ending </TXT> tag.

If you want to remove this information completely, you would remove both beginning and ending TXT tags as well by doing one of the following:

1. *Select* all the information including both beginning and ending tags.
2. *Hit* the **Delete** key (check spacing).

or

1. Place your cursor to the immediate left of the beginning TXT tag.
2. Hold down the **Shift** key while hitting the **Delete** key (check spacing).

- A *double-click* method for selecting text is illustrated in Chapter 6.
- The general rule is one blank line between paragraphs.

After you've edited a few Sections, it is highly recommended that you check your editing skills by running **Reconciliation** and the **Reports** to spot any errors before you've repeated them in every Section of your Job. If you continue to use these tools periodically as your Job progresses, you shouldn't be faced with as many problems to correct at the end of the line when you're trying to get your Job completed on a deadline.

Follow the procedures for using the Reports as outlined in Chapters 5 and 6, and process all the Sections in the Job (even if you haven't edited them all). You will only need to look at and correct errors on the Reports found in the Sections you have actually edited (and ignore the others until those Sections have been edited). Correcting these along the way will save you time at the end!

A common mistake made by new users is deleting the text between tags but leaving the tags. Don't leave behind empty tags!

Text Replacement Methods

Using Brackets & Tailoring Options

Brackets are found in the Master text. They provide you with the ability to choose among several options of information, or in some cases, empty brackets indicate a fill-in is necessary. All bracketed choices in a Section must be resolved before the final submission of the job, and they can be located by using the **Bracket Replacement** button on the toolbar. This function will locate each set of brackets and give you the opportunity to choose from bracketed text or enter new text.

```
Geotextile samples for testing.  Samples shall be submitted a
minimum of [30] [60] [90] [_____] days prior to the beginning of
installation of the geotextiles.
```

We discussed earlier how **Tailoring Options** make specification editing easier by providing a way to include or exclude blocks of information that have been enclosed in Tailoring tags by the Master specification writers. This gives you the ability to easily eliminate requirements that do not pertain to your Job without editing them manually from the Sections.

```
<TAI OPT=GASOLINE>[Automatic pump controller shall conform to
<RID>NFPA 20</RID>.]</TAI></TXT>
```

However, if you haven't used the Tailoring pre-editing options available through the **SI Explorer**, you may come across text like this surrounded with the **<TAI>** tags. It's not too late to use the Editor's Tailoring function described earlier in this chapter, or return to the SI Explorer to Tailor the Sections on the Job level. Either way, it's meant to be a time saver!

A major difference exists when it comes to using these two functions with **Revisions**:

- The additions and deletions with **Brackets *will*** be marked as Revisions.
- When you remove **Tailoring Options**, they ***will not*** be marked as Revisions.

Using Revisions

The use of the **Revisions** feature calls for close attention especially since it is the standard setting. Before you ever begin to edit the first Section of your Job, you need to know if you are required to show Revisions.

You use Revisions when you need to show the information that is to be added or deleted without actually executing the change. If you know that you do not have to use Revisions when you set up your Job, you can disable it from the **Options** tab in the New Job dialog box (discussed earlier in Chapter 2).

Just how does this feature work? Here's a portion of text that has been edited with Revisions enabled:

<TXT>The publications listed ~~<DEL>below </DEL>~~form a part of this specification to the extent referenced. The publications are referred to within the text by ~~<DEL>the</DEL>~~<ADD> their</ADD> basic designation only.</TXT>

- The word "**below**" was deleted as well as the trailing space. With Revisions enabled, instead of actually removing the word, it was instead surrounded by **<DEL>** tags and displayed in **red strike-through**. This indicates that the text is tagged for deletion.
- The word "**their**" was added to replace the word "the" so that word is surrounded by **<ADD>** tags and displayed with **green underline**, indicating that they are to be added.

Avoid deleting or adding partial words!!

Doing this will make proofing redlines easier and less complex.

When I toggle the Revisions view off I have all these gaps between words and paragraphs, what am I doing wrong?

To avoid ***gaps*** you need to make sure you include trailing spaces and hard returns in your redlines. Using revisions is more complicated than editing without revisions, so you must pay close attention to what you include in the markup.

You will learn more about editing with Revisions In **Chapter 6**, by using shortcut keys, double-click method and highlighting.

To remove tags *without* removing their content, you can use one of two methods either right-click and choose **Remove Tags** or use **CTRL+M**.

Using Revisions

Reversing or Executing from the Editor

But what if you want to change something that has been marked with either **ADD** or **DEL** tags? There are functions to *reverse* each in the **SI Editor**. On the **Edit** menu, you'll find these two commands:

- **Undelete Redlined Revisions** will *remove* **DEL** tags and *leave* the text that had been marked for deletion with red strikethrough.

  ~~<DEL>below </DEL>~~

- **Delete Added Revisions** will *remove* the **ADD** tags and *remove* the text that had been added in green text.

  <ADD>their</ADD>

You can also use these two commands:

- Remove only one occurrence by *selecting* it, then *clicking* the corresponding command to reverse it.
- Remove all occurrences within a Section by *clicking* the appropriate command without any text selected.

The **Execute Revisions** command in the **Editor** makes ***permanent*** all changes marked using the Revisions feature. This action ***cannot*** be reversed by the Undo command, so you must be certain that you no longer need the marked Revisions.

In Chapter 5, we'll cover how to **Execute Revisions** for an entire Job or for selected Sections from the **SI Explorer** prior to finalizing your Job.

On the SI Editor's **Edit** menu, you'll find the **Execute Revisions** command. To *execute* **Revisions** — both **ADD** and **DEL** — within the open Section, *click* the **Execute Revisions** command.

When marked Revisions are executed, the changes will become ***permanent***, and the **ADD** and **DEL** tags will be removed along with the red strikethroughs and green underlining. The changes now appear as regular text and will carry the attributes of the tags that enclose it.

Make sure to **Backup** the Job or Local Master before using the Execute Revisions command! Learn more about using the **Backup** feature in Chapter 6.

Using Tables

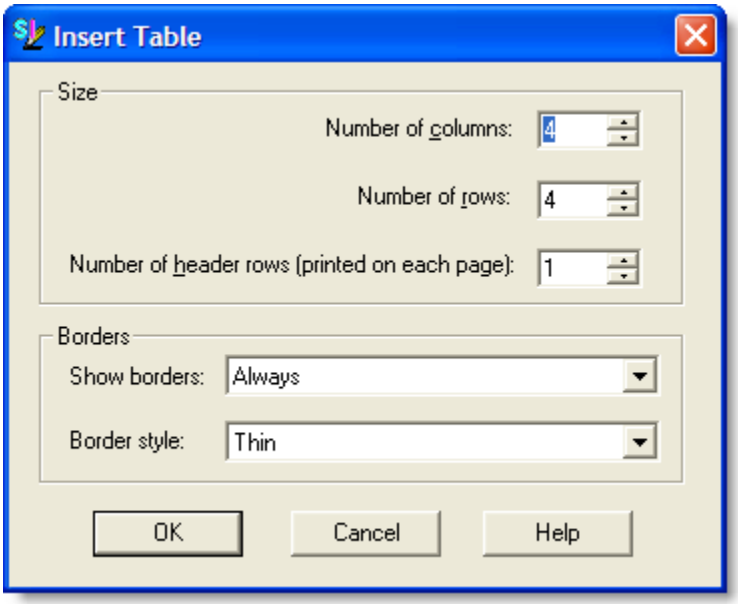
Inserting Formatted Tables

Formatted Tables were introduced in SpecsIntact version **4.3.0.821**. The use of **Formatted Tables** deserves close attention as they are a unique breed designed specifically for the SpecsIntact Editor. Before you begin using Formatted Tables, you need to insure everyone working with you is using v4.3.0.821 or higher.

To learn more about ***all*** of the Tables functionality, begin by going to SpecsIntact's Help and browsing to the **Insert | Table** Menu.

SpecsIntact will continue to support older style tables (using TBL tags) indefinitely.

SpecsIntact's Formatted Tables allows you to design professional Tables for organizing text and data into rows, columns and cells. To begin using Tables, go the **Tables Menu** and *choose* **Insert Table** or *select* the **Formatted Table button** from the SI Editor's Tags Bar or *press* the **F5** key.



When Inserting a **Formatted Table**, you have several options available. You can choose how many Columns and Rows you need as well as how many rows should be Header Rows. The Header Rows will print on each page if the table cannot fit on one page.

Don't confuse SpecsIntact Formatted Tables with Microsoft Word® or Microsoft Excel®.

Using Tables

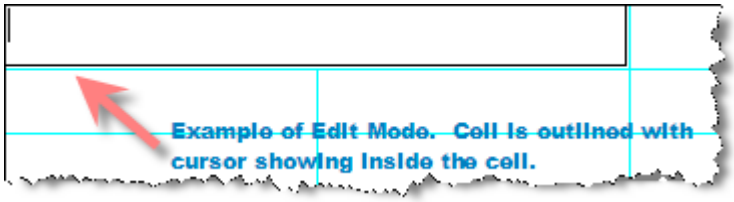
Using Formatted Tables

Before you begin editing a new Formatted Table, it is important to understand how they function. SpecsIntact Formatted Tables are a unique breed specifically designed for the SpecsIntact Editor. There are several menu items available while working in tables, either by choosing the Table drop down menu or by taking advantage of the right-click menus.

Caution: In order to save edits in Tables, the cursor ***must be*** in a blank cell or outside the table.

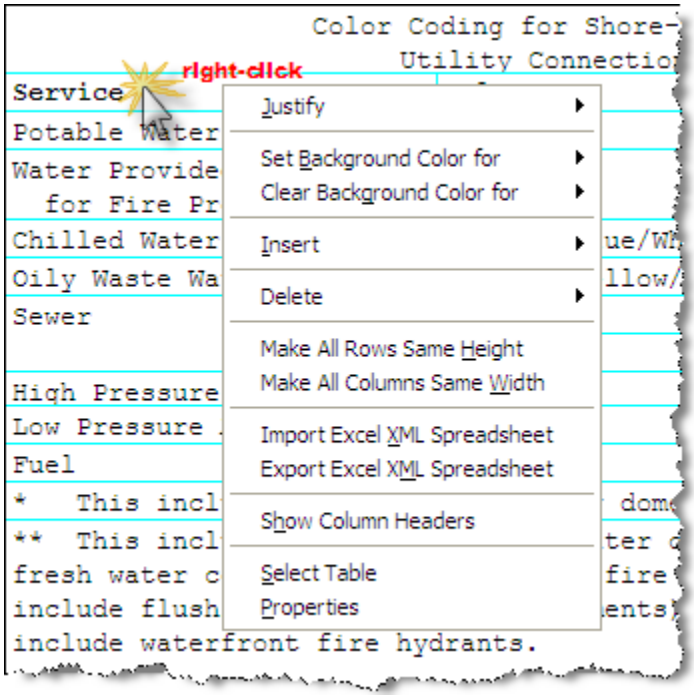
As you learned earlier in this chapter, the default settings are set to use Revisions, another important detail to note is how to handle Formatted Tables that require a lot of edits. Rather than having **ADD** and **DEL** Tags throughout the edited cells, consider copying the entire table and pasting it below the existing formatted table. This way the Table will be surrounded by one set of **ADD** tags which makes it easier to edit. Once the edits are complete remember to delete the original table!

The **Edit Mode** is activated by left-clicking in a cell.



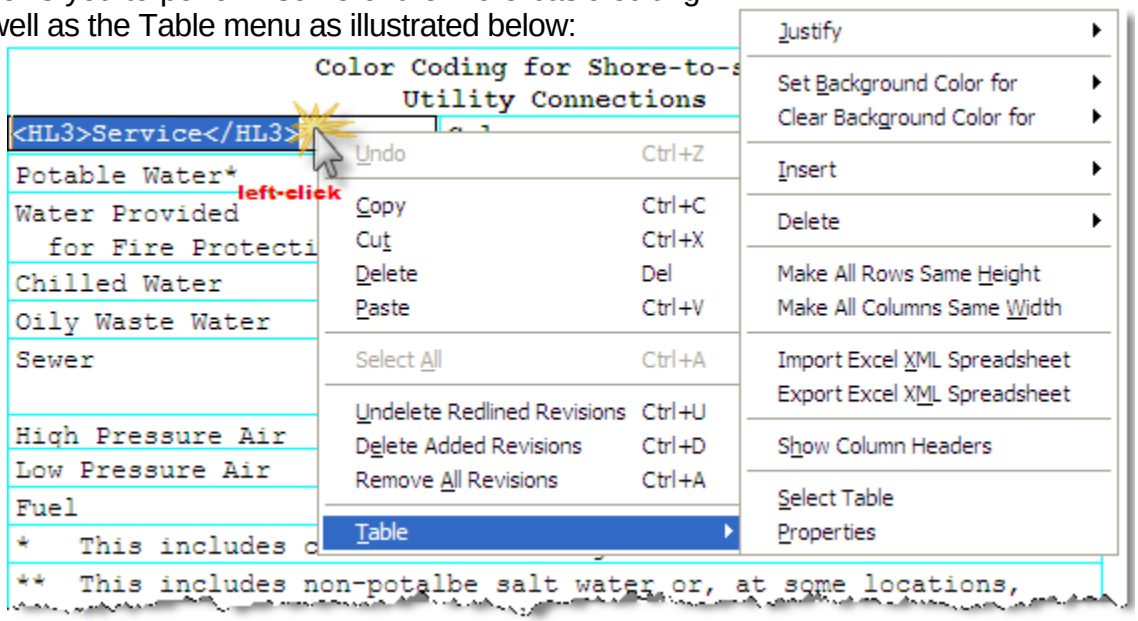
There are a couple of things you need to be aware of while working in **Edit Mode**. When tags are present, its Color attribute isn't visible. Also, the **Merge** and **Unmerge** features are not available from the **Table Menu** unless two or more cells are selected or the cell is a merged cell.

Right-click menus will make editing your Formatted Tables faster and easier, but there are some things you need to know about using these menus. The first menu is activated by simply placing the mouse cursor over the row or cell then Right-click. This is the **Table Menu**.



This menu provides options available for changing the entire table.

You can also use the second menu which is an **Editing Menu**. This menu allows you to perform some of the more basic editing functions as well as the Table menu as illustrated below:



How do I highlight either a row or a cell in my table?

Selecting Rows or Cells in formatted Tables can be done two ways. The first method is done by holding down the left mouse button while you drag the pointer over the text or cell. The Second method you can use is to select a Row or Cell left-click on the first cell, hold down the Shift key and click on the additional cells.

In Chapter 6, we'll give you some additional tips for using Tables.

In order to turn off the keeping tags make your table editing less complicated, we recommend you **View | Tags** command. This goes against the general rule of visible while editing, but it will make table editing easier. As soon as you complete your table editing, make sure to turn the **View | Tags** command back on. Also, wait until all the text has been entered in the table before you begin adding your tags for References, Submittals, etc.

Formatting

Parts and Capitalization

One of the keys to using SpecsIntact successfully is correct formatting. Not only is this important for SpecsIntact to work properly, but the agencies served by SpecsIntact require it. In Chapter 3, we covered the basic three **Parts** of each Section, as well as **Article**, **Paragraph** and **Subparagraph** levels. If you need to, review this material again as you begin to edit. Keeping this structure is vital to producing a correctly formatted Job.

When editing Sections in Divisions 02 through 49, do not delete any of the three Parts, even if you do not need them. If they are not applicable to the Section, they must remain in the Job, followed on the next line by the words **Not Used** in title case (without a period) and surrounded by **<TXT>** tags.

With tags visible:

```
<PRT =3><TTL>PART 3   EXECUTION</TTL>

  <TXT>Not Used</TXT>
```

With tags hidden:

```
PART 3   EXECUTION

  Not Used
```

Capitalization should be consistent throughout the Job, including the initial letter of certain specific nouns and of proper names. Some examples would be:

- **Contracting Officer** - When referring to the representative of a government agency with authority to make decisions.
- **Government** - When a government agency is a part of the contract.
- **Contractor** - When referring to the contractor who is party to an owner-contractor agreement.

Formatting

Text and Numerals

Formatting Numbers:

- Spell out **feet** when no inches are used.
  (8 feet)
- Spell out **inches** when no feet are used.
  (8 inches)
- When using **both feet and inches**, it is permissible to use symbols.
  (8'-8", 8'-2-1/2")
- A complete dimension must appear on one line; do not separate.
- Standard designations must appear on one line; do not separate.
  (ASTM C 270, ANSI ASME A17.1)
- Use numbers whenever possible, and always for dimensions. When defining both quantity and dimensions, use the written word for quantity and the number for the dimension.
  (three 1/2 inch holes)
- Always use figures for degrees, percent, and money (3 inches by 5 inches, 50 degrees F (20 degrees C), 20 percent, $5.50).
- Decimals should be expressed in figures.
  (6.235)
- For quantities less than one, a zero should be used before the decimal point.
  (0.235)
- To maintain uniformity throughout the specification, fractions should be typed using individual keys rather than the limited number of fraction keys provided on standard keyboards.
  (1/4 and 1/2)
- Omit unnecessary zeroes in time and money references.
  ($200, 9 p.m.)

The following tags control text appearance:

- **<HL1>** Underline
- **<HL2>** *Italic*
- **<HL3>** **Bold**
- **<HL4>** Center

Don't confuse these with the **<HLS>** tag which allows you to highlight text (in orange) for on-screen display or draft printing through the Editor or when publishing to PDF. This tag can be used to call attention to particular text as the specifications are being prepared. The **<HLS>** tag has no affect on the final, processed Sections.

I've used the highlight tag throughout my Section to draw attention to areas the Project Manager needs to review, can I remove them without having to go through the entire Section?

As a matter of fact there is! The SI Explorer gives you the capability to Remove the HLS Tags for an entire Job or selected Sections. For a Job or Sections, *right-click* and choose the Option to **Remove Change/ Highlight Tags**.

Formatting

Units of Measure and Symbols

Keep in mind these are guidelines that may not work in all situations. You should always check the spacing visually, especially at the beginning or end of a sentence.

When formatting Metric and English measurements, certain spacing works best to ensure that the formatting is right when one or the other of the measurements is hidden, especially during printing. In the following examples, the underscore _ indicates one space.

For mid-line placement:

```
...your text<MET>_3 meters</Met><ENG>_10 feet</ENG>_your text...
```

But if it falls at the start of a sentence:

```
Your text<MET>_13 millimeter</Met><ENG>_1/2 inch</ENG>_your text...
```

Or at the end of a sentence:

```
...your text<MET>_3 meters</Met><ENG>_10 feet</ENG>.
```

Punctuation is placed outside the tags:

```
...your text<MET>_3 meters</Met><ENG>_10 feet</ENG>,_your text.
```

Symbol NO-NO List

Because of potential problems, the following should be *written* instead of using the symbols:

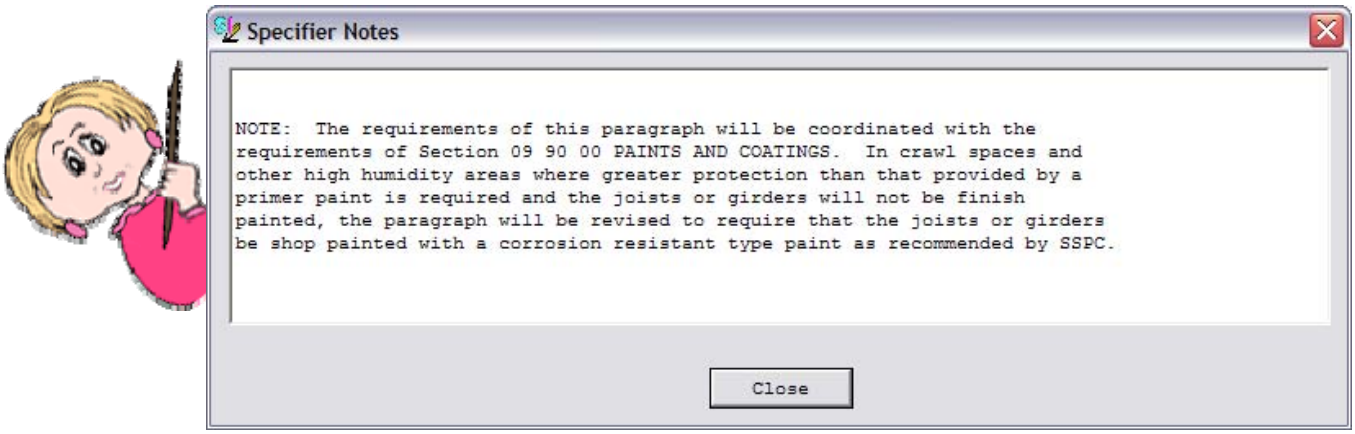
- **percent not** %
- **degree not** °
- **plus not** +
- **minus not** -
- **by not** X
- **per not** /
- **at not** @

Notes

When you need to insert a **Note**, use the **NTE** button located on the **Tags Bar**. This will insert Note **<NTE>** tags, Asterisk **<AST/>** tags, and Note Paragraph **<NPR>** tags, followed by the word **NOTE** and a colon (:). It should be inserted on a new line immediately below the previous one (no blank line between). Here's what a Note looks like with text inserted:

```
<NTE>
<&AST>
            <NPR>NOTE:  Insert grade or class of compost suitable for
            the surface required.  Insert local or state
            regulation defining class or grade of compost.
            Where local or state regulations do not define grade
            or class, insert requirements for screening to limit
            particle size.</NPR>
<&AST>
</NTE>
```

With Notes hidden, only the colored triangle symbol is visible, but clicking on the symbol will display the Note content in a box like this:

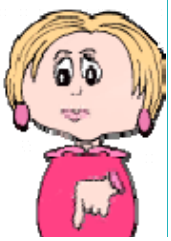


When you print with Notes visible, it looks like this:

```
*****************************************************************************
            NOTE:  Insert grade or class of compost suitable for
            the surface required.  Insert local or state
            regulation defining class or grade of compost.
            Where local or state regulations do not define grade
            or class, insert requirements for screening to limit
            particle size.
*****************************************************************************
```

References

In Chapter 3, we discussed the tags that relate to **References**. You may need to review that information as you edit. In the following you'll find an overview of what you need to know to add or delete information and tags relating to References as you edit your Sections.



It may help you understand editing your References better if you know what the end result will be when your Job is processed.

The **Reference Article** of each Section will contain the following tagged information for only the References **<REF>** used in that Section:

- Sponsoring Organizations **<ORG>**
- Reference Identifiers **<RID>**
- Reference Titles **<RTL>**

```
</REF><REF><ORG>ASPHALT INSTITUTE (AI)</ORG>

<RID>AI MS-02</RID>                <RTL>(1994; 6th Ed) Mix Design Methods for
                                   Asphalt Concrete and Other Hot-Mix Types</RTL>
```

Throughout the rest of the Section, only the Reference Identifiers **<RID>** are used.

RIDs and their content appear in pink:

```
[Portland Cement shall conform to <RID>ASTM C 150</RID>,
```

If you place your mouse pointer over a **RID**, a tip box with its corresponding information will display:

```
<RID>ASTM C 150</RID>              <RTL>(2005) Standard Specification for Portland
Unified Master Reference List [ORG: ASTM] = (2005) Portland Cement
```

In Chapter 5, we'll explain more about processing and what occurs to make the **01 42 00 Sources for Reference Publications Section** unique to your Job, while creating a unique **Reference Article** in each Section.

Character Limits

Organization
511 Characters

Reference ID
30 Characters

Reference Title
300 Characters

Using Reference Wizard

Adding References

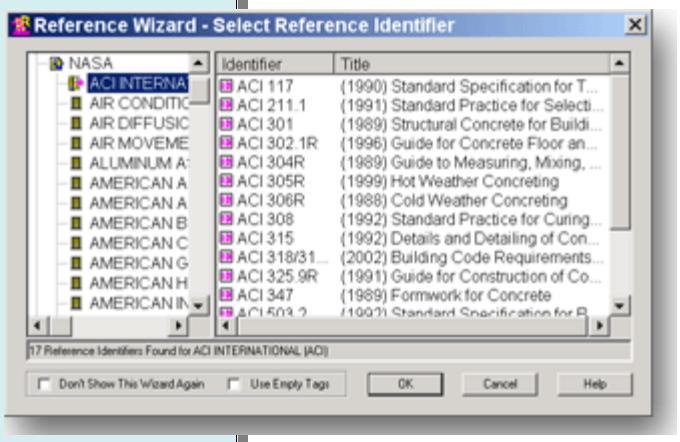
Remember that you learned in Chapter 3 that the only Reference-related tagged information that appears in your Section text (outside of the **Reference Article**) is the **Reference Identifier <RID>**.

Adding References has been simplified with the introduction of the SI Editor's **Reference Wizard**. Place your cursor where the new **RID** should go and click the corresponding button on the Tags Bar.

The **Reference Wizard** will open (if it doesn't, go to the **Editor's Tools** menu, *click* **Options**, *choose* the **References** tab, and *click* the checkbox to use Reference Wizard). The Wizard will display the Master Reference lists in the left pane.

1. *Click on* the reference list you want to use to display the **Organizations**.
2. *Double-click* the Organization to display a list of it's **RID**s with their **Titles**
3. *Double-click* on the **RID** you want to insert.

If this **RID** and its corresponding information is not found in the Section's **Reference Article**, you'll be prompted to insert it — *click* **Yes**. It will return you to the Reference Article so that you can confirm the action. After that, scroll down in the text to where you inserted the **RID** to continue editing.



The Reference Wizard's auto open feature can be disabled by clicking the **Don't Show Wizard Again** box at the bottom of the Wizard.

The **Use Empty Tags** checkbox at the bottom of the Wizard will allow you to insert a set of the tags you want without any content between them.

You can choose one or more of the listed **RIDs** by clicking them in the right pane. Hold the **Shift** key to make sequential selections. Hold the **CTRL** key to choose separated selections.

When you choose a Reference **<REF>** in the Wizard, it includes **<ORG>** tags surrounding the name of the Sponsoring Organization, plus **RID** and **RTL** tags. If you don't select corresponding information for these, blank **RID** and **RTL** tags will accompany your selected **REF**. If you select a **RID**, it will be accompanied by the corresponding **RTL**.

Removing References

Removing a Reference that you are not using in your Section is easier than adding one. Since the only Reference-related tagged information that appears in your Section text (outside the **Reference Article**) is the **Reference Identifier <RID>**, you only need to remove the unwanted **<RID>** tags and their contents from the text.

You ***do not*** remove anything from the **Reference Article** of the Section. This will be handled automatically later when you select **Reconciliation** during Job processing.

Having said that, there is one exception to this rule. If you are using **Revisions** and you're required to show deletions in the **Reference Article**, you can edit it manually to accomplish this.

It is very important that the **RIDs** in the text and in the **Reference Article** are ***identical*** to enable the processing to work correctly. Inserting these by using the **Reference Wizard** will help.

To check a RID against the Master Reference list:

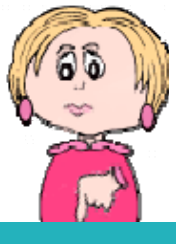
1 *Position* your cursor between the **RID** tags.
2 *Click* the Editor's **Tools** menu and *choose* **Check Reference** or right-click

This check occurs automatically when you add a RID to the text of a Section using the Reference Wizard.

<RID>ASTM C 150</RID>

In Chapter 5, we'll discuss what happens to References during the processing of your Job. Chapter 6 will help you make corrections based on the QA Report results.

Submittals



We covered the tagging of Submittals in Chapter 3, and it's important to keep that information in mind as you edit. Here is an overview of what you need to know when editing Submittals.

Submittal tags and their content appear in **blue**.

It may help you understand editing your Submittals better if you know what the end result will be when your Job is processed.

The **Submittal Article** of each Section will contain the following information for only the Submittals used in that Section:

- **SD Numbers** and **Descriptions**
- **Submittal Items**

As you can see from the example, List **<LST>** and Item **<ITM>** tags are used to provide the proper formatting.

```
<LST><SUB>SD-03 Product Data</SUB></LST>

    <ITM>Manufacturer's catalog data shall be submitted for the following:</ITM>

    <ITM><SUB>Conduit Piping</SUB></ITM>
    <ITM><SUB>Concrete Mortar</SUB></ITM>
    <ITM><SUB>Brick Mortar</SUB></ITM>
    <ITM><SUB>Gaskets</SUB></ITM>
    <ITM><SUB>Compression Joints</SUB></ITM>
    <ITM><SUB>Frames, Covers and Gratings</SUB></ITM>
    <ITM><SUB>Precast Concrete Manholes</SUB></ITM>
```

In the text of the Section **outside** the Submittal Article, only the **Submittal Items** are used.

```
<SUB>Cable Supports</SUB>
```

This creates a unique Submittal Article for each Section and allows the information to be extracted for the **Submittal Register**.

In Chapter 5, we'll explain more about processing, what occurs in the **01 33 00 Submittal Procedures Section**, and how a **Submittal Register** is produced.

Submittals

There are eleven different categories for Submittals, called **Submittal Descriptions**. They are identified by an **SD Number** followed by the **Title**.

These are found only in the **Submittal Article** of each Section, with the **Submittal Items** listed under each. In the text of the Section, ***only*** the Submittal Items are entered, exactly as listed in the Submittal Article, and surrounded by <SUB> tags.

Submittal Descriptions

SD-01 Preconstruction Submittals
SD-02 Shop Drawings
SD-03 Product Data
SD-04 Samples
SD-05 Design Data
SD-06 Test Reports
SD-07 Certificates
SD-08 Manufacturer's Instructions
SD-09 Manufacturer's Field Reports
SD-10 Operation and Maintenance Data
SD-11 Closeout Submittals

A **Submittal Classification** indicates when Government approval is required for a **Submittal Item**, and appears only in the **Submittal Article**. If a Submittal Item referenced in the text requires approval, then its listing in the Submittal Article should be followed by a semi-colon, one space, and a set of **<SUB>** tags containing the letter **G** as illustrated below**.** Make sure it is placed inside the same set of **<ITM>** tags as the Submittal Item. If the Submittal Item has no classification it is considered to be ***For Information Only***.

```
<ITM><SUB>Fluorescent lamps</SUB>; <SUB>G</SUB></ITM>
```

Valid Submittal Classifications

SpecsIntact Code	Codes	Description
No Code	FIO	For Information Only
G	GA	Government Approval
D	DA	Designer of Record Approval
C	CR	Government Conformance Review of Design
R	DA/CR	Designer of Record Approval Government Conformance Review of Design
A	DA/GA	Designer of Record Approval Government Approval

Reviewers also are only listed in the **Submittal Article**. If you need to indicate a reviewer, you do so within the same set of **<SUB>** tags. Following the Classification **G**, use <u>one separator</u> (you can use <u>either</u> a space, a comma, a pipe symbol (|), or a dash) and insert up to five characters.

```
<ITM><SUB>Fluorescent Lamps</SUB>; <SUB>G A/E</SUB></ITM>
```

Adding Submittals

Remember that you learned in Chapter 3. **Submittal Items** are listed under their corresponding **Submittal Descriptions** (containing SD numbers and names) within **PART 1** below the **Submittal Article** and surrounded with a set of Submittal tags **** and within a set of Item tags **<ITM>**
</ITM>.

Submittal Items that appear in Submittal tags below the SD Numbers should be used in **only one** principal subpart of the technical Section, either as an **Article**, **Paragraph**, **Subparagraph**, or within the **text**. They are not case sensitive.

To insert the Submittal tags, use the **Submittal Key** button.

Removing Submittals

Unlike the Reference Article, you **do edit** the **Submittal Article**. Therefore, when you remove a **Submittal Item** from the **Submittal Article** you must also remove it from the text (along with the beginning and ending submittal tags ****) and vice versa. If you remove a **Submittal Item** from the text, then you ***must*** remove it from the **Submittal Article** (along with the tags).

In some instances you may not need a particular Submittal Item, but do need to keep the supporting text. As stated above, delete the **Submittal Item** from the **Submittal Article** first (along with the tags). Once that is done, locate the supporting **Submittal Item** found in the body of the Section. But in this case, rather than deleting the entire Submittal Item you'll only need to remove the beginning and ending submittal tags **** as outlined below.

Removing Tags With Revisions

Place cursor between **** Tags, right-click and choose **Remove Tags**

- OR -

Use the keyboard shortcut key **Ctrl + M**.

Removing Tags Without Revisions

Place cursor on the left side of the <SUB> Tag and press the delete key.

Our engineer gave me a Submittal Item to add to a Section, but he said it belongs under SD-19. Is this possible?

No. Since the agencies adopted the Unified Submittal Descriptions, only the eleven listed earlier in this chapter and the **01 33 00 Submittal Procedures Section** may be used. The SpecsIntact web site's Knowledge Base (http://si.ksc.nasa.gov/uic/techhelp.htm) contains a conversion chart for the older numbers.

Post Editing Tips

Now that you've made all the text changes, it's time to move on to the automated processes that make SpecsIntact unique.

But before you do, there are a few things you need to check.

After editing a Section, check the formatting by hiding all the on-screen elements that won't appear in the printed document — tags, Revisions, notes, formatting marks, and which ever unit of measure you're not using for the Job.

With all these hidden, visually check the formatting of the Section. There should be one blank line between paragraphs.

Before making any changes to adjust the formatting, don't forget to turn the tags back on to avoid inadvertently deleting any of them.

Support Problems Encountered Commonly

"I have a table that is in Microsoft Excel® that needs to be added to my Section, can this be done?"

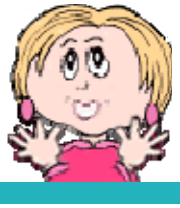
Amanda in Albany

As a matter of fact Amanda, it can be! First, you must prepare your Section by adding a Formatted Table that matches the number of rows and columns as the Excel worksheet. Once the Table has been added, *right-click* and *choose* **Import Excel XML Spreadsheet**. From the **Specify File Name** Dialog Box, *browse* to the **Excel XML Spreadsheet** then *select* **Open**.

Keep in mind, that it is important to understand the formatting of the Excel spreadsheet since it determines how well the Table imports into your Section. We highly recommend taking the time to review the Table information located in the SpecsIntact Help Files. To learn more about Importing Tables, see the following topic:

http://si.ksc.nasa.gov/WebHelp/SIEditor/hid_ediImportExcel.htm

Post Editing Tips



When you're finished editing, don't forget to use the **Spell Check** feature. You can access this function from the Editor's **Tools** menu.

In Chapter 6, you will learn how to Backup your Job. It is a good habit to use this tool at the end of each day when you have finished your editing.

So remember….Backup, Backup, Backup!

If you have been using **Revisions**, do not execute them yet.

What you learned from this chapter:

- To edit a Section of your Job in the SI Editor, you always open it from the SI Explorer.
- The SI Editor's toolbar allows you to control which elements are visible on your screen, and check the formatting by hiding the non-printing elements.
- The SI Editor's Tags Bar provides buttons for easily inserting tags, which should never be typed manually.
- SpecsIntact's advanced Revisions feature allows information that's being added or deleted to be marked before these changes are actually made permanent .
- Editing shortcuts can make editing quicker.
- You should use the Quality Assurance tools (covered in Chapter 5) periodically as you edit to spot mistakes and prevent repeating them throughout the Job.
- Adding and deleting References and Submittals have special rules for each that, when followed, enable some of SpecsIntact's automated features to work correctly.
- When you've finished editing, always run a spell check and visually check your formatting with non-printing elements hidden.

Chapter 5

Processing & Printing

In this chapter you'll learn:

- To use the Quality Assurance tools.
- What happens when you use the Process feature.
- How to locate and correct the problems found on the Reports.

As mentioned earlier, one of the things that sets SpecsIntact apart from word processing programs are the automated features that help assure the quality of your finished specifications. The QA tools can help you find problems so that you can correct them before you commit your Job to paper. As we mentioned in Chapter 4, it is highly recommended that you use the **Reconciliation** feature and **Reports** periodically as you edit the Sections of your Job so that you're not faced with editing errors you've repeated throughout the Job. Regardless, you should run these Reports again at least twice before printing — once to find any final errors, and again to confirm that you've fixed those errors.

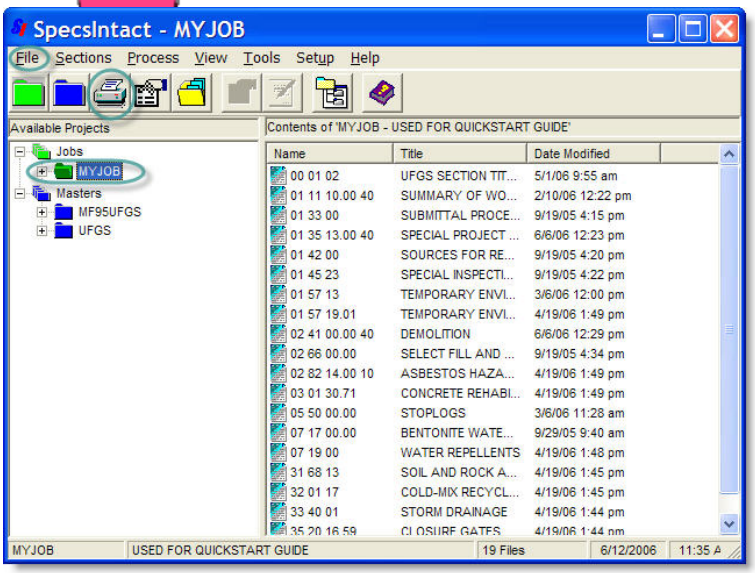
The Process & Print function includes the Reconciliation functions and QA Reports, which are key to completing your Job successfully.

The **Process and Print/Publish** function provides one-stop shopping for all the tools you need to take you to the finish line. So let's take a look at the tools in this multi-function tool kit!

Process & Print/Publish

Since the **Process & Print/Publish** command has multiple functions, you will need to become familiar with it as you work on your Job, and especially as you finish your text editing.

You access it from the SI **Explorer**:



Click your **Job folder** in the left pane and use one of the following to open the **Process & Print/Publish** dialog box:

— *Click* the **File** menu and choose **Process & Print/ Publish**.

OR

— *Click* the **Print** button on the Toolbar

OR

— *Right-click* the **Job** folder and choose **Process & Print/Publish** from the pop-up menu.

The Print Processing dialog box has seven tabbed screens.

If your Job doesn't contain a cover page, you ***will not*** see the **Other Documents** tab.

If you don't have **Adobe Acrobat**, you ***will not*** see the **PDF/Publish** tab, and you must have Microsoft Word installed for the **Word Publish** tab to be visible.

To make the correct choices in the **Print Processing** dialog box, it is important to understand the relationship between **Reconciliation** and **Verification** — think of *active* versus *passive*.

- **Verification Reports** are *passive* in that they only provide information — reporting errors and discrepancies that are found. Verification doesn't *do* anything about the problems — you have to fix the errors and resolve the discrepancies.

- **Reconciliation** is *active* because it actually *does* something — it checks and compares, and then *makes changes* based on those findings.

These two work hand in hand, so it is important to *select* **Reconciliation** to achieve the correct results on the **Verification Reports**.

The three types of **Reconciliation** — **Reference**, **Address**, and **Submittal** — are all slightly different, and produce different results. But what they all have in common is that their goal is to eliminate the listing of elements that are not used in the text of your Job.

So what automatic changes does **Reconciliation** produce in the output files?

Briefly, here are the changes that the three **Reconciliation** functions make. Keep in mind these changes appear in the output versions of the Sections, not in the original .sec files.

- **Reference Reconciliation** only makes changes within the **Reference Article** of each **Section** so that it lists only those **References** that are actually cited in that Section's text.

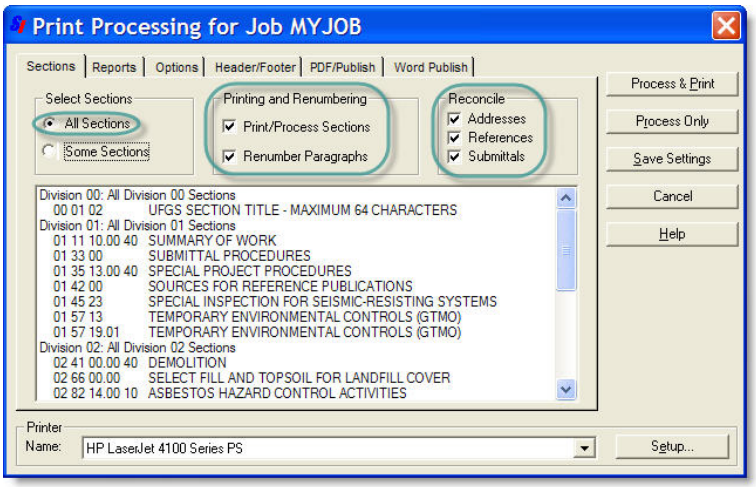
- **Address Reconciliation** should be used in conjunction with Reference Reconciliation. It only changes the **01 42 00 Sources for Reference Publications Section**, making it unique to the Job by listing only the **Sponsoring Organizations** of References actually cited throughout the Job.

- **Submittal Reconciliation** only changes the **01 33 00 Submittal Procedures Section**, making it unique to the Job by listing only the **Submittal Descriptions** actually used throughout the Job.

Process & Print/Publish

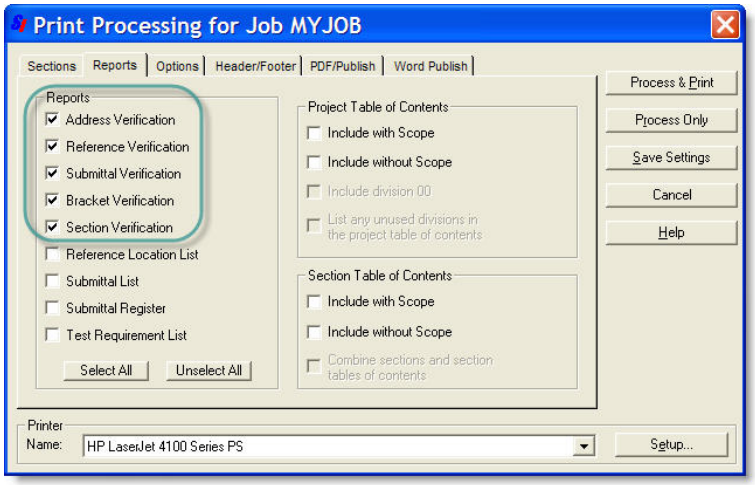
Producing QA Reports

The first thing to remember when using the **Reports** function is that to get accurate results, you must process the entire Job as well as using the **Reconciliation** functions. Here are the default selections on the **Sections** and **Reports** tabs:



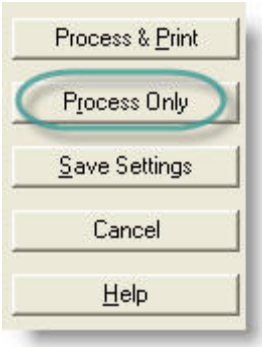
Sections Tab

- **All Sections**
- **Print/Process Sections**
- **Renumber Paragraphs**
- **Addresses**, **References**, and **Submittals**



Reports Tab

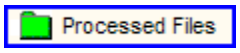
- **Address Verification, Reference Verification Submittal Verification, Bracket Verification, and Section Verification**



After you've made these selections, *click* the **Process Only** button to create the electronic files for your Reports (.rpt) and processed Sections (.prn).

If you select **Process and Print,** it will send your entire Job and the Reports to your printer in addition to creating the electronic files.

Viewing & Printing Reports

The Report results can be found in the 

Processed Files folder under your Job in the **SI Explorer's** left pane, with the contents of the folder displayed in the right pane with an **.RPT** file extension.

You can print any of these reports from the SI Explorer by selecting the ones you want from the right pane and clicking **Print/Publish**.

ADDRVER.RPT	ADDRESS VERIFICATION REPORT
BRKTVER.RPT	BRACKET VERIFICATION REPORT
DUPEREF.RPT	REFERENCE VERIFICATION REPORT
REFVER.RPT	REFERENCE VERIFICATION REPORT
SECTVER.RPT	SECTION VERIFICATION REPORT
SUBMVER.RPT	SUBMITTAL VERIFICATION REPORT
TTLDIFFS.RPT	REFERENCE TITLE REPORT

The Report files (.rpt) can be opened in the SI Editor just like Section files. When you open a Report, you'll either see that there were no problems or there will be a list of problems found. The listed problems are hyperlinked to the Sections where they appear — just *double-click* and the Section will open with the cursor placed at the location of the problem.

Will it affect the results I see on the Reports if I don't check the boxes to perform Reconciliation?

Yes, Reconciliation does effect the Report results. That's why the Reconciliation boxes need to be *checked* any time you produce the Verification Reports — and all Sections in the Job selected for processing — otherwise, you'll see reported errors that would be taken care of automatically using the Reconciliation process.

Keep in mind that the changes resulting from Reconciliation are only seen in the **output files** (prn, pdf or doc) — your .sec files remain unchanged.

So now that you've produced the Reports, what do they show you?

In Chapter 6, we'll show you in more detail how to use the various types of Report results you may encounter. For now, it's important to learn how the QA process works.

Here's a sample of the kind of results you might see on a **Section Verification** Report. The top portion explains the type of problem, followed by the list and locations. These are hyperlinked to the Section so that all you have to do is *double-click* and the Section will open in the Editor, and locate the cursor at the Subpart with the problem.

In this example, you would need to show the list to your engineer to determine how to resolve these issues — by either adding the missing Sections that are being referenced, or by eliminating the references to them.

SECTION VERIFICATION REPORT

==========

This report lists all Sections that are referenced in other Sections,but that are not in the Job or Master.

HINT: Double-clicking a Section number will open the Section in the Editor.

==========

SECTION	SUBPART	SECTION REFERENCED
01 33 00	1.4.1.2	23 09 53.00 20
01 33 00	1.4.1.2	23 09 23.13 20
01 33 00	1.4.1.2	23 05 93
01 33 00	1.4.1.2	23 08 01.00 20
01 33 00	1.4.1.2	26 12 19.10
01 33 00	1.4.1.2	26 12 19.20
01 33 00	1.4.1.2	33 71 01
01 33 00	1.4.1.2	26 11 16
01 33 00	1.4.1.2	26 11 13.00 20
01 33 00	1.5.8	01 78 23
01 33 00	1.9	01 45 00.10 10
01 57 19.02	3.3.2.3	32 92 19
01 57 19.02	3.4	00 73 01
05 21 13	2.3	09 90 00

Here's another example. This report shows that some of the bracketed choices have not been selected. In this case, you would locate the error, check your marked-up printed copy to determine whether your engineer had marked a selection or entered information. Each set of brackets in the Sections needs to be replaced with text and the brackets themselves removed before the Job is complete.

BRACKET VERIFICATION REPORT

This report lists all brackets remaining in the text.

HINT: Double-clicking a Section number will open the Section in the Editor.

SECTION	SUBPART	BRACKETS	EXPLANATORY NOTES
01 33 00	1.2	10	
01 33 00	1.3.1	2	
01 33 00	1.3.2	2	
01 33 00	1.3.3	4	
01 33 00	1.4.1	10	
01 33 00	1.4.1.1	5	
01 33 00	1.4.1.2	38	
01 33 00	1.4.1.3	1	
01 33 00	1.5.1	20	

Always check first to see if a problem is simply the result of a typo.

When no problems are found — your goal before the Job is complete — the Reports will indicate that no errors or discrepancies remain.

```
                    ADDRESS VERIFICATION REPORT

==============================================================================
This report lists any Reference Organization that appears in a Section
Reference Article without a corresponding listing in either the Sources for
Reference Publications Section (01 42 00, 01420, or 01090) or the
Supplemental Reference List.

HINT: Double-clicking a Section number will open the Section in the Editor.
==============================================================================

SECTION         REFERENCE ORGANIZATION

ALL REFERENCE ADDRESSES HAVE BEEN VERIFIED
```

Keep in mind that in the case of both **Submittals** and **References**, the listing must be identical — including spaces — in the text, the corresponding Submittal or Reference Article in the Section, as well as in the **01 33 00 Submittal Procedures Section** or the **01 42 00 Sources for Reference Publications Sections**. Otherwise, they will appear on the Reports as discrepancies.

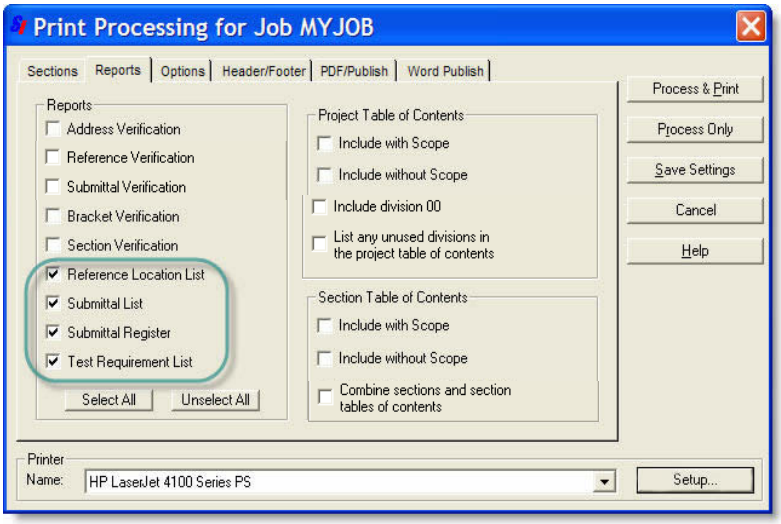
One major difference is that **References** are <u>case sensitive</u>, while Submittals are not.

Chapter 6 has details on fixing the different types of errors and discrepancies you may encounter on the Reports.

Other QA Tools

Submittal Register and Lists

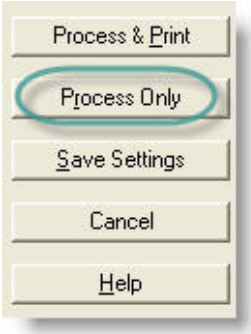
In addition to the Verification Reports, you can also produce several lists and the **Submittal Register** from the **Reports** tab in the Print Processing dialog box.



Reports Tab

- **Reference Location List**
  Itemizes all the References cited in the text, followed by the Section and Subpart locations where they are found.
- **Submittal List**
  Itemizes all the Submittal Descriptions found in the Sections' Submittal Articles, along with the Section and Subpart locations in which they are found.
- **Submittal Register**
  Lists the materials, products or items for each Submittal, as well as the Section and Subpart locations in which they are found.
- **Test Requirements List**
  Itemizes all the test requirements cited and includes the Section and Subpart locations in which they are found.

After you've made these selections, *click* the **Process Only** button to create the electronic files for your Reports (.rpt) and processed Sections (.prn).



If you select **Process and Print,** it will send your entire Job and the Reports to your printer in addition to creating the electronic files.

The **Submittal Register** can only be *viewed* as a Portable Document File (**PDF**) or on **hard copy**.

Printing Your Job

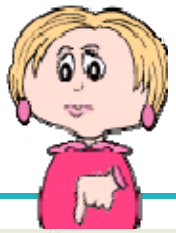
You've arrived! You've now reached the point where you want to produce your Job's edited Sections in their final format — all the changes, no tags, perfect!

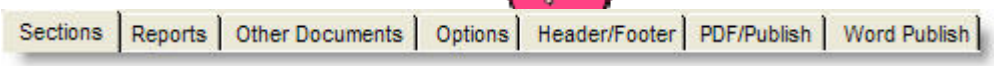
Once again, you'll use the **Process and Print/Publish** command on the SI Explorer's **File** menu or the corresponding button on the toolbar. This time, you'll make different selections than you did when you accessed this box to produce the Reports. It's important to understand how to make the right choices so you can achieve the exact results you want.

As we mentioned before, the **.sec** files are your ***editing*** copies of the Sections — they are used to produce your final copy. We've discussed the processing that occurred as you used the QA tools from the Process & Print/Publish function. But instead of using the Process Only button as you did before, you'll now use the Process & Print button.

But before you click that button, you want to make certain that the settings on all the tabs are correct to produce the Job the way you want. In addition, you may have been asked to deliver the electronic files in **Word** or **PDF** instead of SpecsIntact's **.prn** files — the two additional output formats that can be produced through SpecsIntact, as long as you have the corresponding software.

So let's take another look at the multi-function Print & Process/Publish dialog box.





By this time, you should be familiar with the first two tabs of the **Process & Print/Publish** box, but you'll now learn how to use their settings to produce your Job. In addition, you'll see how the settings on the **Other Documents, Options** and **Header/Footer** tabs are used to determine what your output files contain. And finally, you'll learn about the settings you'll use if you choose to **Publish** your Job in either **PDF** or **Word**.

Process & Print/Publish Settings

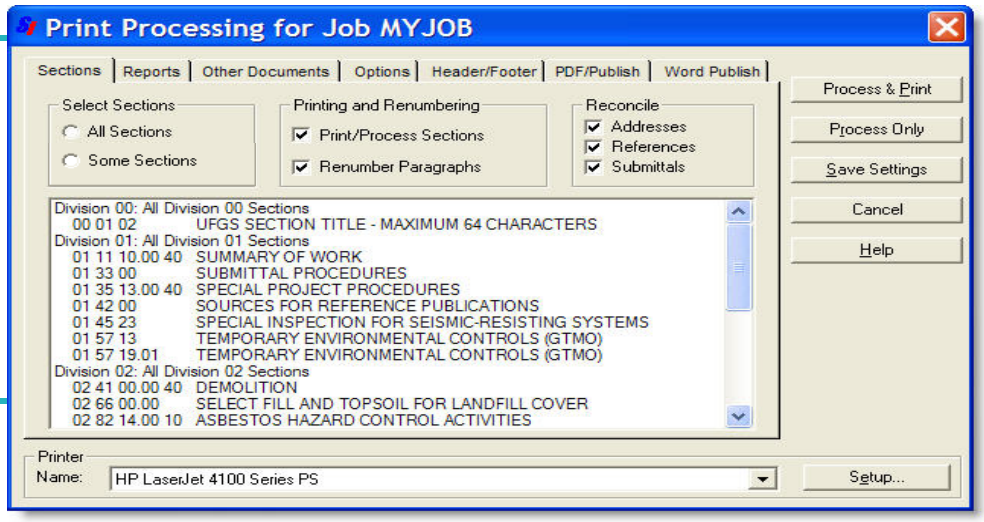
Sections & Reports Screens

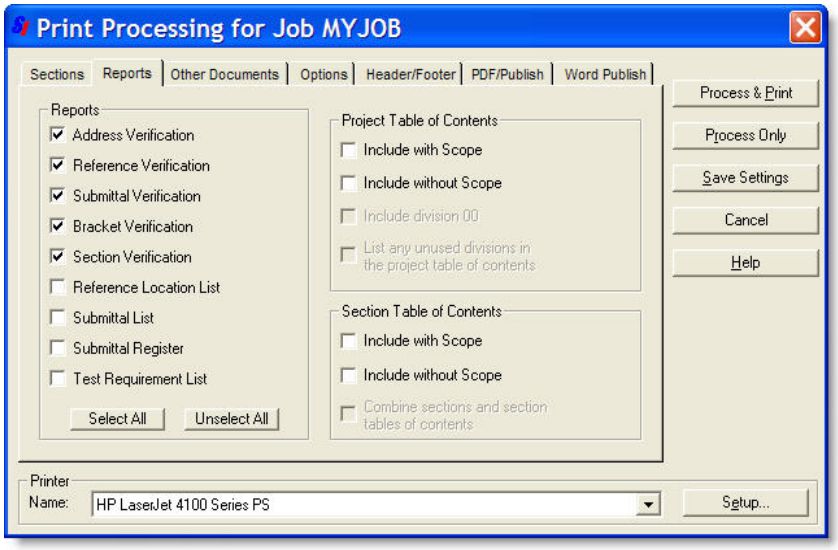
On the next few pages, we'll show you the settings and choices you should make to produce your final, processed and printed Job.

If you want to save some but not all the settings made on the various screens of this dialog box, make the ones you want to save first, *click* the **Save Settings** button, then make the additional selections that you want to use for just this printing.

Sections Tab

- **All Sections**
- **Print/Process Sections**
- **Renumber Paragraphs**
- Reconcile **Addresses**, **References**, **Submittals**
- Choose **Printer** from drop-down list (If you plan to produce the output files in Word you can skip this step.)



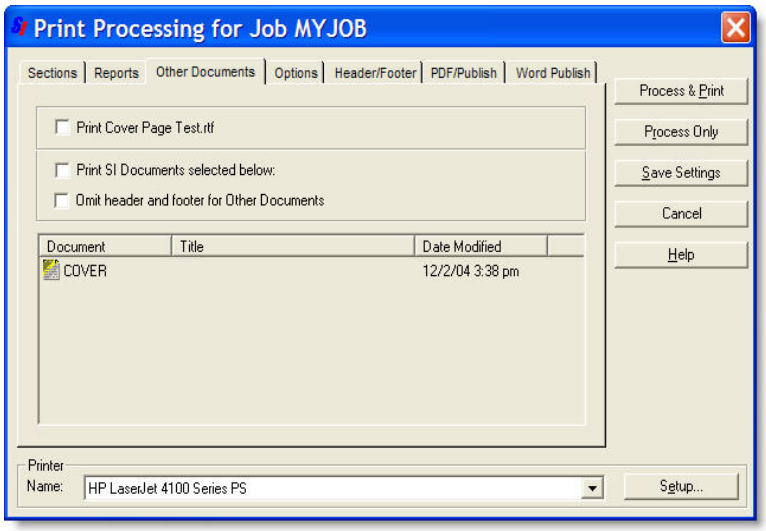


Reports Tab

- **Submittal Register**, if required
- Any of the **Lists** requested by your project engineer
- All **Verification Reports** (Run again to double check that all issues have been resolved.)
- Make **Project** and **Section Table of Contents** selections based on requirements (**Scope** is a brief description).

Process & Print/Publish Settings

Other Documents & Options Screens

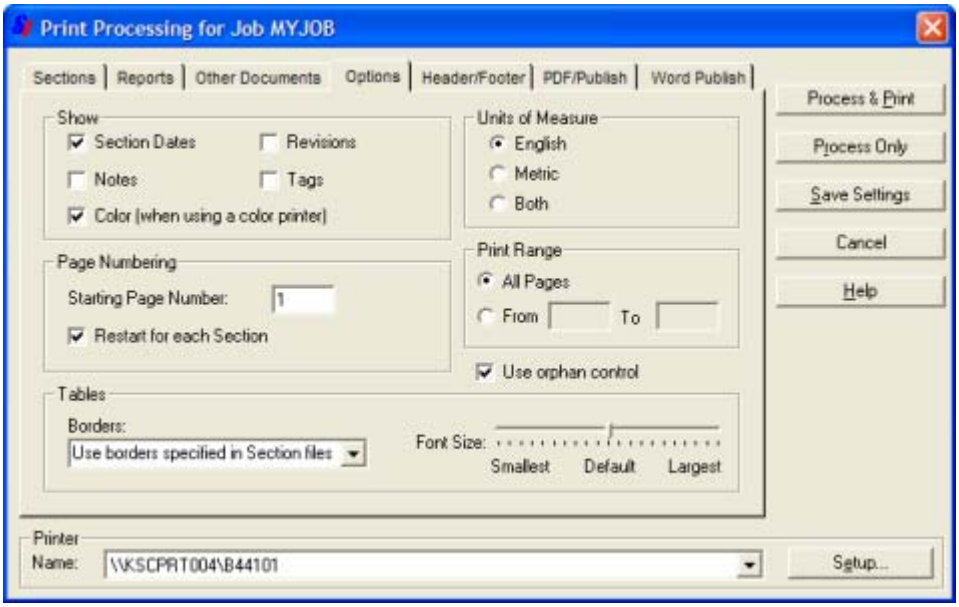


Other Documents Tab

- If you created a **Cover Page** to include, in either **.sec** or **.rtf** format, you will see this tab. If you do not have a Cover Page, this tab is not visible. Check to include the cover with the Job. Covers can be added using the SI **Explorer**'s **File** menu | **Properties** | **General** tab.

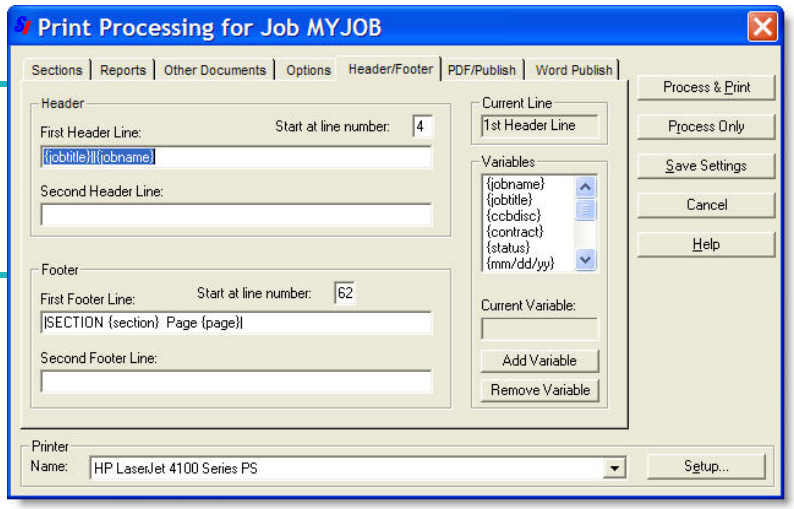
Options Tab

- **Section Dates** (if required)
- **Color (when using a color printer)** - Setting also controls PDF output.
- **Units of Measure** choose **English, Metric** or **Both**.
- The starting **Page Numbering** can be changed.
- Select whether you want each Section to start over with it's own numbering.
- Print Range **All Pages**.
- **Table Borders** can be controlled by the Section File or by changing the selection to **Use No Borders** or Use **Thin Borders for all Tables**.
- The sliding **Font Size** bar provides better control of the Fonts within Formatted Tables that may result from printer drivers.



Header/Footer Tab

- Make any changes to **Headers** or **Footers** (see tips below). The defaults reflect the standard requirements for printing a Job.



Pipe (|) symbols control the horizontal position of the text in the **header** and **footer** lines. The **pipe symbols** are inserted by using the **Shift** and **** (backslash) key. Here are the formatting rules:

- To **center,** place text between two pipes: **|this text will be centered|**
- To **align left,** use no pipes: **this text will align left**
- To **align right,** place two pipes to the right of the text: **||this text will align right**
- To **align both right and left,** place two pipes dividing the text: **this text will align left||this text will align right**
- To **center and align both right and left,** use pipes to divide: **this text will align left|this text will center|this text will align right**

When setting headers and footers, here are two tips to help you with formatting:

- The vertical position can be changed by entering a different number in the **Start at Line Number** box (header default is 4; footer default is 62).
- Change the first line or add a second line for either header or footer by using the **Variables** box.

So just what is a **Variable**?

Think of it as a place holder. It represents the information that will be placed on each page in the location indicated.

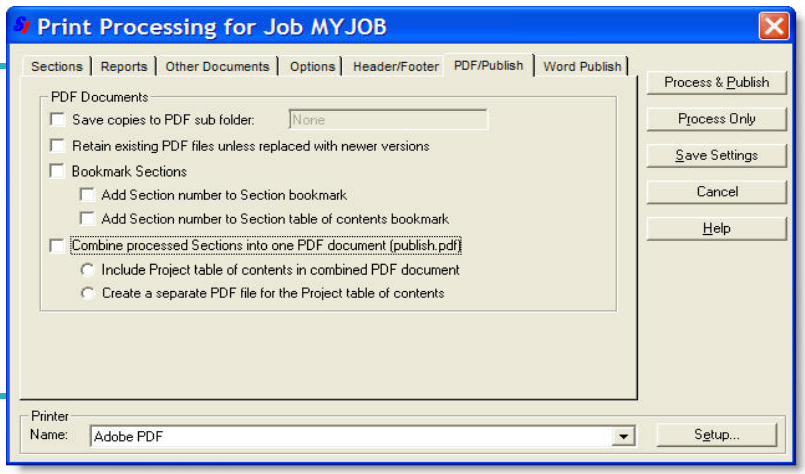
Process & Print/Publish Settings

PDF Publish & Word Publish Screens

Creating **PDF** or **Word** files is called **Publishing** since it produces electronic files that can later be printed on paper through the SI Explorer. Once published, they can be found in PDF and Word folders under the Job in the Explorer's left pane.

PDF Publish Tab

- If **PDF** output files are required, select the desired settings. The electronic files produced will be visible in the left pane of the SI Explorer under the Job in a **PDF Files** folder. Your **Adobe Acrobat** software should be chosen from the Printer drop-down box (names will vary by Adobe version).

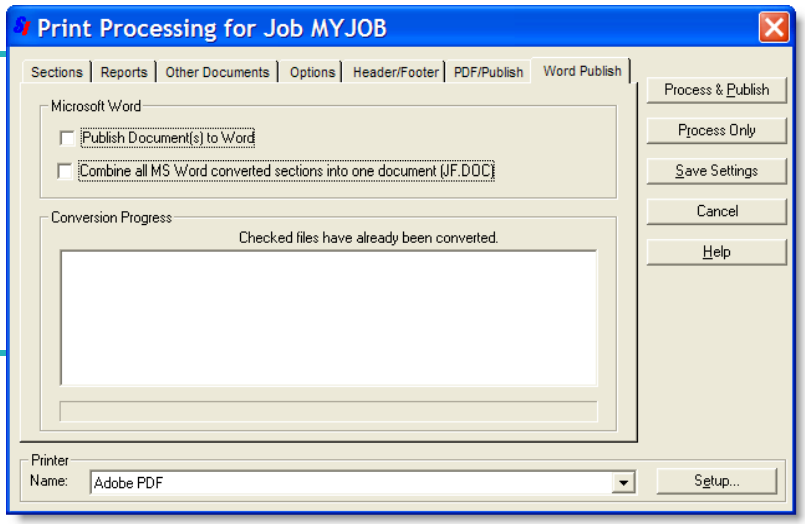


Using the **PDF Publish** feature to **Combine Processed Files Into One document** is a good idea.

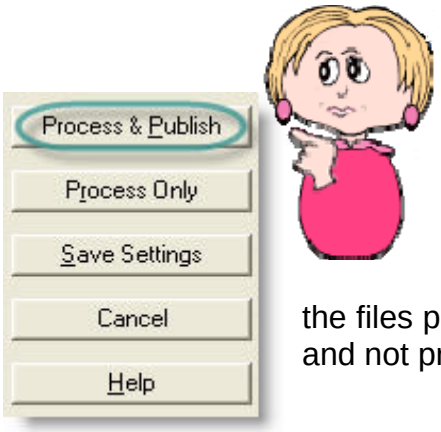
1. From the **Print Processing** dialog box, *select* the **Reports** tab.
2. Under the **Project Table of Contents** section, *select* **Include without Scope**.
3. Under the **Section Table of Contents** section, *select* **Include without Scope**.
4. On the **PDF Publish** tab, *select* **Bookmarks** and *choose* **one** or **both** options below:
   - Add Section number to Section bookmark
   - Add Section Number to Section table of contents bookmark
5. *Select* **Combine Processed Files Into One Document (publish.pdf)**.
6. *Choose* **Include Project Table of Contents in Combined PDF Document**.
7. *Select* **Process & Publish**.

Word Publish Tab

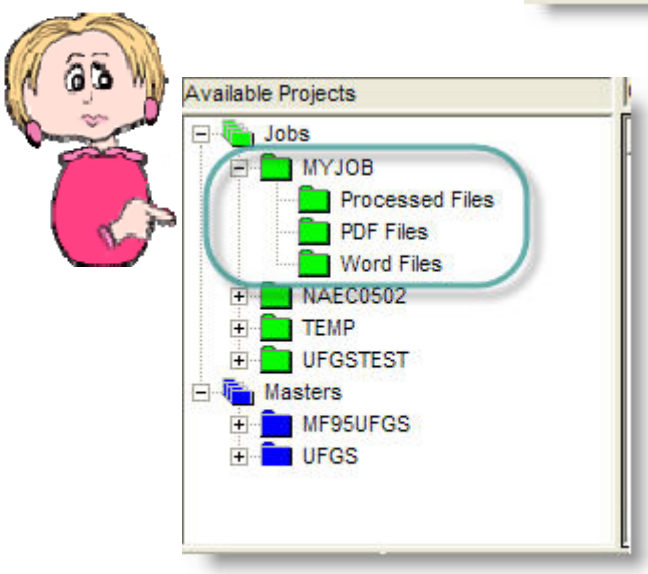
- If **Word** output files are required, select the desired settings. The electronic files produced will be visible in the left pane of the SI Explorer under the Job in a **Word Files** folder. When Word is selected for output, the Printer box is no longer visible.



! *Only* Section files can be published in Word, not the Tables of Contents or Reports.



After you've made all your selections, *click* the **Process and Print** button. If your choice of output format is **PDF** or **Word**, then the button will say **Process and Publish**, indicating that the files produced will be electronic and not printed on paper.



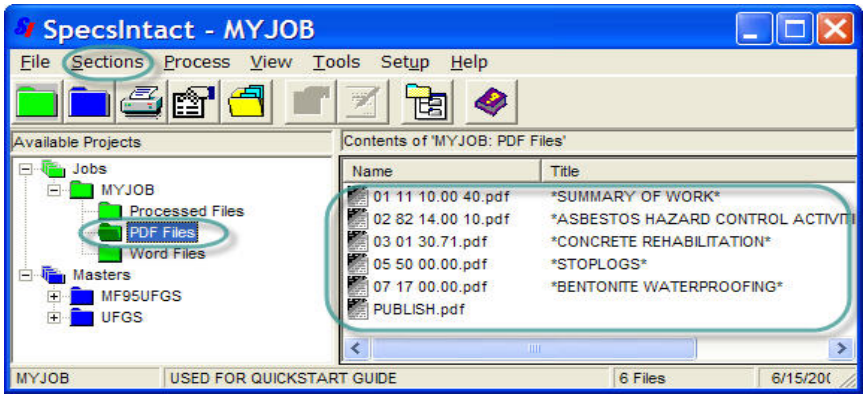
Printing PDF and Word Output Files

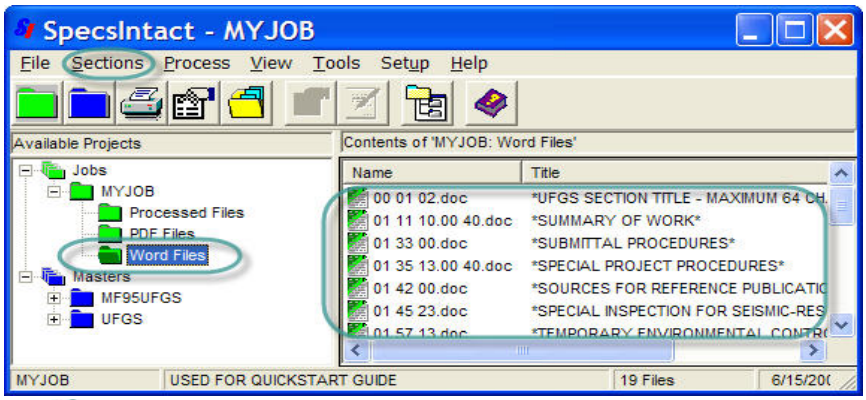
If you use the **Publish** function to produce either **PDF** or **Word** electronic files, you may want to print a hard copy. You can do this from the **SI Explorer** — either for all the Sections that you have in the output folder or for selected Sections.

If you find additional changes you need to make, you can rerun the **Process & Print** function again — just keep in mind that the previous output files — processed Sections (.prn), PDF (.pdf), and Word (.doc) — will be replaced by the new ones (the exception is if you chose the option to retain previous files on the PDF screen).

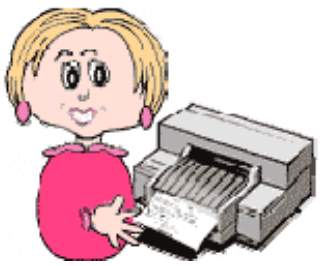
1. *Click* the output folder in the left pane (**PDF Files** or **Word Files**) to display its contents in the right pane.
2. *Click* anywhere in the right pane, then *click* the **Sections** menu and choose the **Select All** command. You can also choose only selected Sections from the right pane if you don't want to print them all.
3. *Click* the **Print** button to send the files to your default printer.

You can also print the **Processed Files** (**.prn**) in the same way.





If you edit your Word output files, these changes will not be reflected in your source .sec files, so if you subsequently generate new Word output files, your changes will be lost.



Support Problems Encountered Commonly

"Help! I changed my headers and footers, but when I went back to Print & Process again, the changes were gone! What happened? Do I have to reset the headers and footers every time I process?"

Karen in Kansas City

No, you just needed to *save* those settings to make them your new defaults. If you open the **Process & Print/Publish** dialog box and go to the **Header/Footer** tab, you can make any changes you want, and then *click* the **Save Settings** button on the right. Keep in mind that doing this will also save any other changes you've made since you opened the dialog box, and they will become the new defaults. It's a good idea to make changes you want to keep first, *click* the **Save Settings** button, and then continue to make one-time changes you don't want to save as your defaults.

By now, you have been through all the major features of SpecsIntact that you need to use to produce your Job successfully.

As with all software, there are many factors that can affect how you need to adapt as you work. In Chapter 6, we'll give you some additional tips and cover just a few of the extra features found in SpecsIntact that can help you use it to it's full potential and yours!

What you learned from this chapter:

- There are a variety of Quality Assurance tools to assist you by checking the various elements of your Job. They are accessed through the Process & Print/Publish function.
- Reconciliation actually makes changes within the Job, while Verification only locates errors and discrepancies that need to be resolved and displays them on Reports.
- By viewing the results of the Reports, you identify the errors and discrepancies found, and hyperlink to their locations so that you can resolve them by first checking for typos, then consulting with your engineer if the issue involves technical content.
- Reports should be rerun until all problems have been eliminated.
- Additional lists and the Submittal Register can also be produced through the Process & Print/Publish function.
- SpecsIntact has a Backup feature that lets you make an archive copy of your entire Job.
- If you are require to use Revisions, you need to execute them prior to the final processing of your Job. It's recommended that you backup your Job before executing Revisions, since those changes will become permanent.
- After all the Reports are clean, you use the Process & Print/ Publish function to produce your Job in the desired output format.

As always, if you have questions or encounter problems, we provide live tech support **Monday - Friday, 12:00 p.m. - 4:30 p.m. (ET)**.

The support email is **KSC-SpecsIntact@nasa.gov**. You can reach them by phone at **321-867-8800**, or fax at **321-867-1444**.

Chapter 6

Tips & Tools

In this chapter you'll learn:

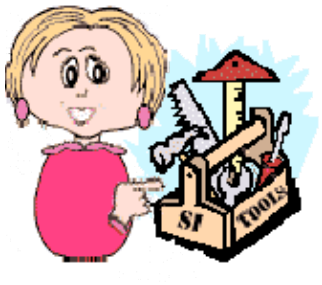
- How to use other handy tools that come with SpecsIntact.
- Tips, shortcuts and editing techniques to make your work easier.
- Proper use of symbols and capitalization.
- How to fix errors and discrepancies that appear on QA Reports.
- What information the Lists can provide.
- How to restore a Job from an archived backup copy.
- How to use a checklist to make sure you're ready to deliver the final Job.

In this chapter, we'll present some additional tips and tools that may help you more effectively produce a finished Job. As we said in the introduction, this **QuickStart Guide** is not intended to cover every aspect of using the software. You should use it in conjunction with the other user tools provided with SpecsIntact and on our web site.

Some of the pages in this chapter are designed to be printed as quick reference charts that you can keep at your desk as you work. There are also pages dedicated to helping you fix the errors and discrepancies found on each of the QA Reports.

As you continue to work in SpecsIntact, you'll find which methods work best for you. As with most software, there are several ways to access functions and perform tasks. With a little experience, you'll discover how to streamline your work process.

More SI Tools



In addition to the features we've covered in the previous chapters, SpecsIntact has some other handy tools you can choose to use along the way.

Customizing Your View

Here are a few changes you can make to adapt what you see on your screen in the **SI Explorer**:

- **Column Headers** — by using the **View** menu, you can change the information that appears in the right pane of the **SI Explorer** by either adding or removing Column Headers. (See caution below)
- **Setup** menu **| Options | General** tab — allows you to adjust settings that control various functions, as well as resetting some defaults.
- **Colors** — You can change the color of the Job, Master and file icons by *right-clicking* on them and choosing the icon color option from the right-click menu.

Choosing to display some of the column headers — particularly the **Section Date** and **Preparing Activity** — may slow down the speed with which the Sections display in the SI Explorer. This is especially true with large Masters or if there's a large number of Jobs.

Keeping Track

Here are tools you might find useful in tracking some of the information about your Job:

- The **Job Properties** box — accessed from **File** menu **| Properties** or toolbar button — has four additional tabs for tracking information. The **Schedule** screen lets you keep track of review status, dates and hours expended. The **Specifiers** screen lets you assign different engineers to specific Divisions. The **Options** screen lets you choose the Units of Measure, Use Revisions (default setting), the MasterFormat Version and now lets you choose the Automatic Paragraph Numbering, Numeric or Alphanumeric. The **Comments** screen allows free-form entry that adds an automatic date/time stamp to each. The Properties box also has a **Print** button in the lower left so that you can produce a printed copy of this information.

- You can use **Setup** | **Options** | **Specifiers** tab to make a reusable list of Specifiers that will be available from the drop-down boxes on the **Specifiers** screen mentioned above.

Emailing Files

It's always a good idea to make a backup of your Job files daily, and it's a good way to archive a finished Job. This same function also provides a method for emailing your entire Job in the .zip file format. The **Backup/Restore/ Manage** box can be accessed from the SI Explorer's **File** menu. You must first make the backup copy of the Job, then select it for emailing.

Due to file blocking at NASA, the Technical Support Staff cannot receive .zip files. If you need to send a Job to SI Tech Support for problem resolution, contact them at **(321) 867-8800** for instruction.

To email Section files, select them in the SI Explorer's right pane and choose the **Sections** menu **| Email** command. With this function, they are sent uncompressed in the .sec format.

Templates

You'll see two different types of templates used in SpecsIntact. You can access both from the SI Explorer's **Tools** menu.

- **Section Templates** — Outlines used as guidelines for creating new Sections. The option to create Section templates on the Tools Menu should be used to create unique Section outlines, *not* new Sections. New Sections can be created from **Add Sections** dialog box.

- **SI Document Templates** — Blank document which may be used to create a cover sheet, project information sheet, sign-off sheet, or other unique documents to be used with specifications.

Keep in mind that in the SI Explorer, the **File** menu commands are for **Job** or **Master** level actions, while the **Sections** menu commands pertain to individual or groups of **Sections**.

SI Editor Format Menu

Formatting commands you can access from the Editor's **Format** menu are:

- **Font**
- **Margins**
- **Change Case**
- **Toggle Indentation**
- **Indentation Amount**

You should use **Font** and **Margins** changes with **caution** since these are global settings that will affect every Job and Master you have as well as the Reports. Check the **Help** topics for these commands to learn more before deciding whether to make changes to the defaults.

SI Explorer Help Menu

From the **Help** menu you can access the following:

- On-Screen **Help** — Features an Explorer view that displays topics in the right pane and a table of contents in the left pane, as well as offering search capabilities.
- **SI Web Site** —Link directly to the SpecsIntact web site resources to download software and Masters, view the Knowledge Base, and keep up on new developments regarding the software.
- **SI Web Help Center** — Link directly to the SpecsIntact web site for resources to assist both novice and proficient users. Here you can discover the Installation Guide, QuickStart Guides, QuickTours, Knowledge Base, Online Help and Support.
- **About SpecsIntact** — Allows you to check the **SI version number** you are using, and documents where SpecsIntact is installed on your system (both important when contacting tech support for assistance).

Don't forget that you can customize the **Editor's Tags Bar** to display only the tag buttons you use frequently. Use the down arrow button at the right end of the Tags Bar to add or remove buttons from the display.

Remember that the **right-click menus** change depending on the actions available in any given situation. If there is something you are trying to do, and you don't know how to perform the action, try *right-clicking* to see if there is a menu option for it.

SI Tag Character Limitations

Certain tags within SpecsIntact have character limitations you should be aware of.

Section Title
120 Characters

Section Number
6 Characters
(MasterFormat 1995)

14 Characters
(MasterFormat 2010)

Date
5 Characters

Article Titles
71 Characters

Paragraph Titles
68 Characters

Reference Organization
511 Characters

Reference Identifier
30 Characters

Reference Title
300 Characters

Section Reference
6 Characters
(MasterFormat 1995)

14 Characters
(MasterFormat 2010)

Table Tips

- For additional flexibility, Tables may be placed within Text **<TXT>**, List **<LST>**, and Item **<ITM>** tags to allow more control of table positioning.
- Formatting tags that you can use inside a table are those for underline, italics and bold.
- Use the **Table** Menu to **Justify** (Left, Center, Right) the text rather than using tags, this will make table editing less complicated.
- Apply additional tagging for References and Submittals, etc. after all the information has been entered into the table.
- A table can be located inside a Note. Do not place **<NPR>** tags around a table within a Note.
- When using measurements in a table, the preferred method is to duplicate the formatting and make a separate table for each measurement (English and Metric). Check for formatting by turning off the tags for each type of measurement separately to ensure clean formatting for both.
- When using Revisions to markup a table consider duplicating the table first, edit the added Table then completely delete the existing table so it will be surrounded by the **<DEL>** tags.

Shortcuts

SI Explorer Keyboard Shortcuts

Ctrl + Key	
New Job	Ctrl + J
New Master	Ctrl + M
Add Sections	Ctrl + A
Process & Print	Ctrl + P
Edit	Ctrl + E
Search & Replace	Ctrl + F
Function Keys	
Screen Refresh	F5
Options	F2
Help	F1
Delete	Delete key

SI Editor Keyboard Shortcuts

Deleting Tagged Elements	Shift + Delete

SI Editor Keyboard Shortcuts

Ctrl + Key	
Delete	Ctrl + D
Copy	Ctrl + C
Copy without Tags	Ctrl + E
Find	Ctrl + F
Replace	Ctrl + H
Find Tags	Ctrl + I
Remove Tags	Ctrl + M
Toggle Indentation	Ctrl + N
Open	Ctrl + O
Print Draft	Ctrl + P
Save	Ctrl + S
Paste	Ctrl + V
Cut	Ctrl + X
Redo	Ctrl + Y
Undo	Ctrl + Z
Page Break	Ctrl + Enter
Function Keys	
Help	F1
Next	F3
Insert Tags	F4
Spell Check	F7
Shift + Function Keys	
Revisions On/Off	Shift + F8

To toggle the following screen elements on or off:

Alt + Key	
Tags	Alt + S
Notes	Alt + N
Revisions	Alt + R
English Units	Alt + G
Metric Units	Alt + M
Both English/Metric	Alt + B
Marks	Alt + A

Editing Techniques

Selecting and Deleting

On the next few pages, you will discover various techniques that can be used to select tagged elements and text. Combining these techniques will help you become a proficient editor. So let's get started!

Keystrokes for Selecting Text

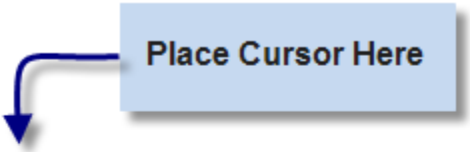
- **Shft + Right** or **Left arrow** — selects one character at a time.
- **Shft + Ctrl + Right** or **Left arrow** — selects one word at a time.
- **Shft + End** — selects from cursor to end of a line.
- **Shft + Home** — selects from cursor to beginning of a line.
- **Shft + Down** or **Up arrow** — selects one line at a time in the applicable direction.
- **Shft + PgDn** or **PgUp** — selects a page at a time in the applicable direction.
- **Shft + Ctrl + Home** — selects from cursor to the beginning of the Section.
- **Shft + Ctrl + End** — selects from cursor to the end of the Section.

You can delete tagged text using the **Shift** and **Delete** keys.

The Shift and Delete key combination can be used to delete an entire tagged element (including any other tagged elements nested within the selected tags). To use this function, the Editor must be in the **View Tags** mode. Position the cursor immediately to the left of the beginning tag of the element you want to delete, *hold* the **Shift** key and *press* the **Delete** key.

The beginning and ending tags will be deleted, along with <u>everything</u> in between. Although this shortcut can delete any tagged item, it is best used for deleting entire Subparts!

For example, to delete a Subpart:




```
</SPT =1.4.1><SPT =1.4.2>1.4.2   <TTL>Storage</TTL>

  <TXT>Inspect materials delivered to the site for damage; unload and store out of
  weather in manufacturer's original packaging.  Store only in dry locations,
  not subject to open flames or sparks, and easily accessible for inspection
  and handling.</TXT>

</SPT =1.4.2></SPT =1.4><SPT =1.5>1.5   <TTL>SAFETY PRECAUTIONS</TTL>
```

Editing Techniques for Revisions

Double-click Method to Select Text

In this Section you will learn when to use the double-click method to remove text versus when to highlight to remove text. The double-click method is preferred when you need to remove an entire Subpart level but for all other instances you must learn how to highlight properly. This will show you how to avoid tagging issues and leaving hard returns and spaces throughout your document. So let's get started! Keep in mind, these examples can also be used whether you are using Revisions or not, but is the preferred method for editing with Revisions!

In order to remove an entire Subpart, place the cursor on a word within the Subpart Title and Double-click .

```
</SPT =2.2.9><SPT =2.2.10>2.2.10   <TTL>Hanger</TTL>

  <TXT>Provide clips or loops for [utility systems] [and] [suspended ceilings] of
  one or more of the following types:</TXT>

   <LST INDENT=-0.33>a.  Lip tabs or integral tabs where noncellular decking or flat plate of
       cellular section is<ENG> 0.0474 inch</ENG> thick or more, and a structural
       concrete fill is used over deck.</LST>

   <LST INDENT=-0.33>b.  Slots or holes punched in decking for installation of pigtails.</LST>

   <LST INDENT=-0.33>c.  Tabs driven from top side of decking and arranged so as not to pierce
       electrical cells.</LST>

   <LST INDENT=-0.33>d.  Decking manufacturer's standard as approved by the Contracting Officer.</LST>

</SPT =2.2.10><SPT =2.2.11>2.2.11   <TTL>Shear Connectors</TTL>
```

Double-clicking again within the Title will expand the selected region to include the **immediate surrounding text and pair of tags**.

```
</SPT =2.2.9><SPT =2.2.10>2.2.10   <TTL>Hanger</TTL>

  <TXT>Provide clips or loops for [utility systems] [and] [suspended ceilings] of
  one or more of the following types:</TXT>

   <LST INDENT=-0.33>a.  Lip tabs or integral tabs where noncellular decking or flat plate of
       cellular section is<ENG> 0.0474 inch</ENG> thick or more, and a structural
       concrete fill is used over deck.</LST>

   <LST INDENT=-0.33>b.  Slots or holes punched in decking for installation of pigtails.</LST>

   <LST INDENT=-0.33>c.  Tabs driven from top side of decking and arranged so as not to pierce
       electrical cells.</LST>

   <LST INDENT=-0.33>d.  Decking manufacturer's standard as approved by the Contracting Officer.</LST>

</SPT =2.2.10><SPT =2.2.11>2.2.11   <TTL>Shear Connectors</TTL>
```

Editing Techniques for Revisions

Double-click Method to Select Text

Double-clicking one more time will expand the selected region to include **entire subpart**.

```
</SPT =2.2.9><SPT =2.2.10>2.2.10   <TTL>Hanger</TTL>

 <TXT>Provide clips or loops for [utility systems] [and] [suspended ceilings] of
 one or more of the following types:</TXT>

  <LST INDENT=-0.33>a.  Lip tabs or integral tabs where noncellular decking or flat plate of
      cellular section is<ENG> 0.0474 inch</ENG> thick or more, and a structural
      concrete fill is used over deck.</LST>

  <LST INDENT=-0.33>b.  Slots or holes punched in decking for installation of pigtails.</LST>

  <LST INDENT=-0.33>c.  Tabs driven from top side of decking and arranged so as not to pierce
      electrical cells.</LST>

  <LST INDENT=-0.33>d.  Decking manufacturer's standard as approved by the Contracting Officer.</LST>

</SPT =2.2.10><SPT =2.2.11>2.2.11   <TTL>Shear Connectors</TTL>
```

If needed, you can continue to use this method until you have **multiple subparts** selected or even the entire **Part** (but you *cannot* select an entire Section by this method). Now that you have learned to remove subparts, let's move onto learning how to properly remove other areas throughout your specification.

While using **Revisions**, the most efficient way to remove key elements such as **TXT**, **LST**, and **ITM** tags, (including indents), is by using the mouse to highlight these areas. By learning to do this correctly you will avoid leaving unnecessary spaces between words and throughout the specification.

Once you become comfortable with the double-clicking method, you may want to try out the **Shift** and **Delete** shortcut for removing entire subparts!

The best way to remove only the Tag, not the text, without having to turn Revisions off is to use the keyboard shortcut **Ctrl + M** or place the cursor between the tags (****), *right-click* and choose **Remove Tags**.

Editing Techniques for Revisions

Highlight to Select Text

Keep in mind that these techniques can be used whether you edit with or without Revisions!

In this example, we will be removing the Submittal Item "**Fabrication Drawings**".

Before:

```
<LST><SUB>SD-02 Shop Drawings</SUB></LST>
START HERE:
<ITM><SUB>Fabrication Drawings</SUB></ITM>

<ITM><SUB>Metal Floor Deck Units</SUB></ITM>
END HERE:
```

After:

```
<LST><SUB>SD-02 Shop Drawings</SUB></LST>

<DEL>     <ITM><SUB>Fabrication Drawings</SUB></ITM>
</DEL>    <ITM><SUB>Metal Floor Deck Units</SUB></ITM>

          <ITM><SUB>Cant Strips</SUB></ITM>
```

Example with Tags & Revisions Hidden:

```
<LST><SUB>SD-02 Shop Drawings</SUB></LST>

<ITM><SUB>Metal Floor Deck Units</SUB></ITM>
```

No Extra Space Where Fabrication Drawings Was Deleted!

With this example, we will be removing the last **TXT** paragraph within a subpart. This highlighting technique will be the same regardless of the last element within the subpart.

Before:

```
</SPT =2.2.5><SPT =2.2.6>2.2.6   <TTL>Cover Plates</TTL>

  <TXT>Sheet metal to close panel edge and end conditions, and where panels change
  direction or butt.  Polyethylene-coated, self-adhesive,<ENG> 2 inch</ENG> wide joint
  tape may be provided in lieu of cover plates on flat-surfaced decking butt
  joints.</TXT>

  <TXT>Fabricate cover plates for abutting floor deck units from the specified
  structural-quality steel sheets not less than nominalthick before
  galvanizing.  Provide<ENG> 6 inch</ENG> wide cover plates and form to match the
  contour of the floor deck units.</TXT>

</SPT =2.2.6><SPT =2.2.7>2.2.7   <TTL>Roof Sump Pans</TTL>
```

START HERE

END HERE

After:

```
</SPT =2.2.5><SPT =2.2.6>2.2.6   <TTL>Cover Plates</TTL>

  <TXT>Sheet metal to close panel edge and end conditions, and where panels change
  direction or butt.  Polyethylene-coated, self-adhesive,<ENG> 2 inch</ENG> wide joint
  tape may be provided in lieu of cover plates on flat-surfaced decking butt
  joints.</TXT>

<DEL><TXT>Fabricate cover plates for abutting floor deck units from the specified
  structural-quality steel sheets not less than nominalthick before
  galvanizing.  Provide<ENG> 6 inch</ENG> wide cover plates and form to match the
  contour of the floor deck units.</TXT>

</DEL></SPT =2.2.6><SPT =2.2.7>2.2.7   <TTL>Roof Sump Pans</TTL>
```

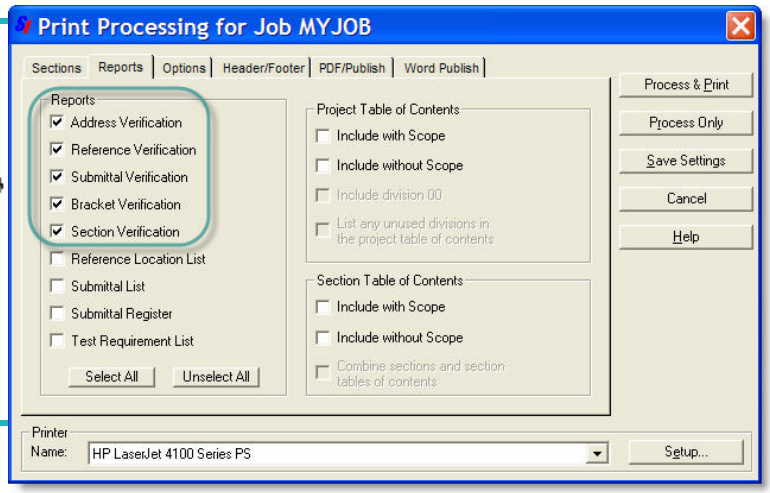
Example with Tags & Revisions Hidden:

```
2.2.6   Cover Plates

  Sheet metal to close panel edge and end conditions, and where panels change
  direction or butt.  Polyethylene-coated, self-adhesive, 2 inch wide joint
  tape may be provided in lieu of cover plates on flat-surfaced decking butt
  joints.

2.2.7   Roof Sump Pans
```

No Extra Space

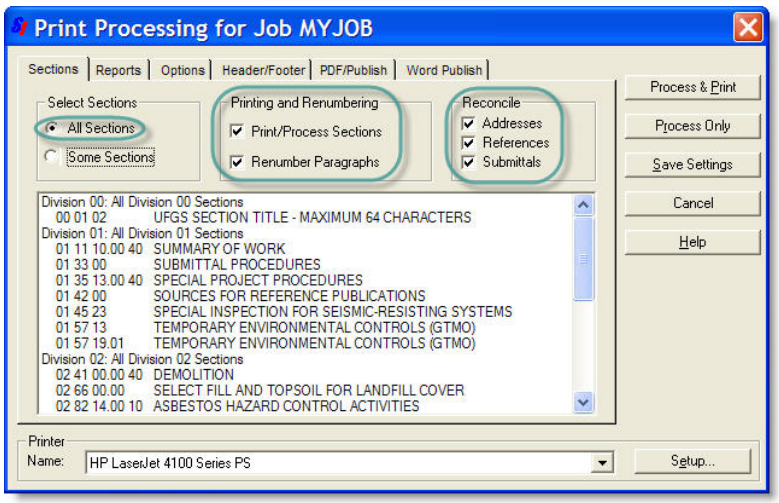
Fixing QA Report Errors and Discrepancies

Using the Reports to identify, find, and fix problems in your Job is key to producing final specifications that are accurate and complete. In the next few pages, we'll illustrate some of the errors and discrepancies you may find and tell you how to resolve them.



Don't forget, the keys to getting accurate Report results are:

- Make sure your Job contains both the **01 33 00 Submittal Procedures Section** and the **01 42 00 Sources for Reference Publications Section.**
- Process all Sections, not just some Sections
- Choose all three **Reconcile** (**Address**, **Reference**, and **Submittals**) checkboxes from the Print Processing **Sections** tab.



After processing, the Reports reside in your Job's **Processed Files** folder. *Click* this folder in the SI Explorer's left pane to display it's files in the right pane. The Reports will have a file extension **.RPT** and a red icon. *Double-click* to open a Report in the SI Editor.

Three helpful hints that apply to resolving problems on any of the Reports:

1 Always check first to see if the problem is the result of a typographical error.

2 Display the **Marks** to check spacing — each space will be represented by one dot on the screen. Show Marks using the command on the Editor's **View** menu or the corresponding button on the toolbar.

3 *Double-click* any **Section number** within a Report to open that Section in the Editor. Your cursor will be placed at the **Subpart** containing the problem. Tags are automatically hidden when you use this hyperlinking from the Reports, but before making any changes, display the tags on your screen to ensure accuracy.

The **Address Verification Report** (**ADDRVER.RPT**) lists **Reference Organizations** that appear in any Section's **Reference Article** without a corresponding listing in either the **01 42 00 Sources for Reference Publications Section** or the **Supplemental Reference List (SRL).**

Remember: If you don't have the **01 42 00** Section as part of your Job you can't use this report.

Address Verification:

- *Verifies* that all **Sponsoring Organizations** with **References** cited in the processed Sections' text appear in the Job's **01 42 00** Section.
- *Generates* a list of **Sponsoring Organizations** used in any Section's **Reference Article** but ***not*** found in the Job's **01 42 00** Section.

Example of Address Verification Results:

```
SECTION REFERENCE ORGANIZATION

06 20 00   DIESEL ENGINE MANUFACTURERS ASSOCIATION  (DEMA)
```

Resolving Discrepancies

If the **01 42 00** Section of the Job already lists the Reference's Sponsoring Organization:

1. *Add* the **Sponsoring Organization name**, **acronym**, **Reference Identifier** and **Reference Title** (with all corresponding **tags**) to the Section's **Reference Article**.
2. *Verify* that the information that you added to the Section's Reference Article is identical — including text, spaces, and capitalization — to the one found in the **01 42 00** Section.

If the **01 42 00** Section of the Job doesn't list the Reference's Sponsoring Organization:

1. *Add* the **Sponsoring Organization name**, **acronym**, **Reference Identifier** and **Reference Title** (with all corresponding **tags**) to the Section's **Reference Article**.
2. *Right-click* on the **Reference Identifier** you just added, and choose **Check References** from the pop-up menu.
3. *Click* **Yes** when prompted to automatically add the Reference to your **Supplemental Reference List** (which will open so that you can confirm the addition).
4. *Open* your Job's **01 42 00** Section and *add* the **Sponsoring Organization name**, **acronym**, **address**, **phone/fax numbers**, **email address** and **web address** (with all corresponding **tags**) making certain that text, spaces and capitalization are identical to the listing you added to the **Reference Article**.

The **Reference Verification Report** actually produces three separate listings: **Duplicate References (DUPEREF.RPT), Reference Title Discrepancies (TTLDIFFS.RPT),** and **References Verification (REFVER.RPT)**.

Reference Verification:

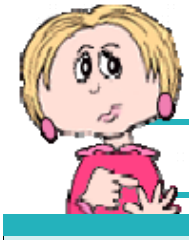
- *Compares* the **References** in each Section's **text** with those in its **Reference Article** and in the **Supplemental Reference List (SRL)**.
- *Identifies* discrepancies by producing three separate reports that list duplicate References, conflicting Titles, and unresolved References.

Duplicate References

The **DUPEREF.RPT** lists of all the **References** that are found in the **Reference Articles** and duplicated in the **Supplemental Reference List**. The **Reference Descriptions** listed on the report are from the **Supplemental Reference List**.

Example of Duplicate Reference Results:

```
SECTION REFERENCE

33 32 16.13   ANSI B16.11

AMERICAN NATIONAL STANDARDS INSTITUTE (ANSI)

ANSI B16.11 1980 Forged Steel Fittings, Socket-Welding and
Threaded

02 41 00 ASTM C29

ASTM C29 1978 Unit Weight and Foids Aggregate
```



Resolving Duplicate

Check **References** in the Sections' **Reference Articles** against those in the **Supplemental Reference List (SRL)**.

- If the duplicates are identical in both locations (exactly the same text, spacing and capitalization) then *remove* the duplicate from the **SRL**.

If the duplicates have differences in the titles or dates, your engineer should review the publications to determine which is applicable to the Section:

- If the **SRL** contains the correct Reference, *edit* the Section's **Reference Article** to *correct* it, then *remove* the duplicate from the **SRL**.
- If the Section's **Reference Article** contains the correct Reference, *remove* the duplicate from the **SRL**.

After all corrections are made, run **Reference Reconciliation** again.

Reference Title Discrepancies

The **TTLDIFFS.RPT** lists **Reference Identifiers** with conflicting Reference Titles in two or more Section **Reference Articles**.

Example of Reference Title Discrepancies Results:

SECTION	REFERENCE	REFERENCE TITLE
26 20 00	NEMA TC 2	(1983) Electrical Plastic Tubing (EPT) and Conduit
26 27 29	NEMA TC 2	(1983) Electrical Plastic Tubing (EPT) and Conduit (EPC-40 and EPC-80)

Resolving Reference Title Discrepancies

- *Compare* **Titles** and determine which is correct for the publication. If publication dates differ, the engineer should review the publication to determine which applies to the Section.
- *Edit* the listed Sections' **Reference Articles** so that they all reflect the correct Title and date for the publication.

Unresolved References

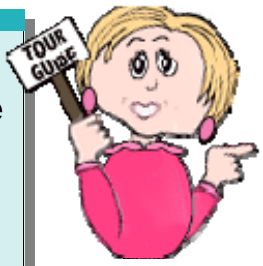
The **REFVER.RPT** lists **References** that appear in any Section's text but not in either the Section's **Reference Article** or the **Supplemental Reference List**.

Example of Unresolved References

SECTION	SUBPART	REFERENCE
33 11 00	2.1.1.1	AWWA C110/A21.10

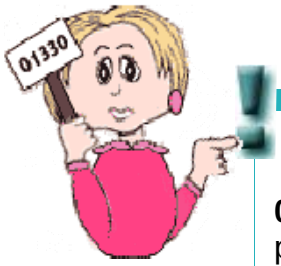
Correcting Unresolved References

- *Add* the **Reference** and **Reference Title** (which includes the Publication date) to <u>either</u> the Section's **Reference Article** <u>or</u> **Supplemental Reference** (SRL).
- If you made your changes in the **SRL**, then *run* **Reference Reconciliation** again to automatically insert them in the **Reference Articles**.



The **Submittal Verification Report** (**SUBMVER.RPT**) is used to report problems that result from the improper use of Submittals. This report is divided into two sections, the first section of this report lists **Sections** that do not cite **Submittal Items** in both the **Submittal Article** and elsewhere in the text, that cite invalid **Classifications**, or that contain **Submittal Descriptions** or **Classifications** outside the **Submittal Article**.

The second section of the report lists **Submittal Descriptions** in the **Submittal Procedures** Section 01 33 00, or that are missing from it.



Remember: If you don't have the **01 33 00** Section as part of your Job you can't use this report.

Submittal Verification:

- *Checks* that all **Submittal Items** appear both in the Sections' **Submittal Article** and also in the Sections' **text**.
- G*enerates* a list of **Submittal Items** missing from either location. See **Example A**.
- *Checks* that all **Submittal Descriptions** used in the Sections' **Submittal Articles** are also listed in the Job's **01 33 00** Section.
- G*enerates* a list of **Submittal Descriptions** missing from the **01 33 00** Section. See **Example B**.

Example A of Submittal Verification Results:

SECTION	SUBPART	SUBMITTAL DISCREPANCY
05 12 00	2.4	SHOP PRIMER was not found in the Submittal Article.
05 12 00	1.3	Class B coating was not found outside the Submittal Article.

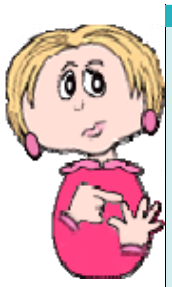
Correcting Submittal Verification Discrepancies

- If a **Submittal Item** appears under an **SD** number within the **Submittal Article** but nowhere in the Section text, either *add* the **Submittal Item** at the appropriate point in the text, or *delete* it from the **Submittal Article**.
- If a **Submittal Item** is located within the text but not in the **Submittal Article** *consult* your engineer to determine which one of the following methods of correction is appropriate:
  Insert it in the **Submittal Article** below the correct **SD number**.
  Remove the **<SUB>** tag surrounding the **Item** within the text.
  Delete both the **Item** and **<SUB>** tag from the text.
- Submittal Descriptions (SDs) and Classifications (G for Government Approved) can only appear in the Submittal Article. Any citations of these in the text (outside the Submittal Article) must be deleted.

Example B of Submittal Verification Results:

STANDARD DESCRIPTION SECTION	SUBPART	INVALID DESCRIPTION
SD-03 Product Data		
03 30 00	1.3	SD-03 Product Materials

Correcting Submittal Verification Discrepancies



Submittal Description (SD) Numbers used in the Job must be listed in the Job's **01 33 00 Section**.

- If the **SD Number** reported is a valid Submittal that is not found in **Section 01 33 00**, then *add* it to the **01 33 00**.
- If the **SD Number** reported is invalid, it must be *changed* to one of the eleven valid numbers cited in the **01 33 00 Section,** or *omitted* from the Section.

The **Bracket Verification Report** (**BRKTVER.RPT**) lists all **brackets** remaining in the Sections that must be removed and replaced with text before a Job is complete.

Example of Bracket Verification Results:

SECTION	SUBPART	BRACKETS
01 33 00	1.2	10
01 33 00	1.3.1	2
01 33 00	1.3.2	2
01 33 00	1.3.3	4
01 33 00	1.4.1	10

Resolving Bracket Verification Problems

- If a **bracket** was inadvertently left in the text, *delete* the bracket.
- If **Bracketed Options** were left in the text, a selection must be made or information filled in and the brackets deleted. Consult your engineer to determine the correct option to include.

The **Section Verification Report** (**SECTVER.RPT**) lists any **Sections** that are referenced in other Sections of the Job, but that are not part of the Job.

Example of Section Verification

SECTION	SUBPART	SECTION REFERENCED
01 33 00	1.4.1.2	23 09 53.00 20
01 33 00	1.4.1.2	23 09 23.13 20
01 33 00	1.4.1.2	23 05 93
01 33 00	1.4.1.2	23 08 01.00 20
01 33 00	1.4.1.2	26 12 19.10

Section Verification:

- *Checks* to see that all **Sections** cited in the text are included in the Job.
- *Generates* a list of any Sections referenced that are not included in the Job.

Section Reference Tags should only contain the Section Number.

<SRF>09 90 00</SRF>

Resolving Section Verification Discrepancies

Check with your engineer to determine if you should:

- *Add* the referenced **Sections** to the Job.
- *Remove* the **text** that references the missing Section.

The **Reference List** (**REFKYLST.RPT**) includes all the **References** cited in the Job, followed by the **Sections** and **Subpart Numbers** where they can be found.

```
29 CFR 1910.120

SECTION:   01 57 19.02        SUBPART:   1.1

SECTION:   01 57 19.02        SUBPART:   1.2.11


29 CFR 1910.1200

SECTION:   05 21 13           SUBPART:   1.1

SECTION:   05 21 13           SUBPART:   1.3

SECTION:   05 21 13           SUBPART:   1.4.2
```

The **Submittal List** (**SUBMLIST.RPT**) includes all the **Submittal Descriptions** found in the **Submittal Articles**, along with the **Sections** and **Subparts** in which they can be found. The SD definitions are extracted from the **01 33 00** Section.

```
SD-02 Shop Drawings

Drawings, diagrams and schedules specifically prepared to illustrate some
portion of the work.

SECTION:   03 30 00           SUBPART:   1.3

SECTION:   05 12 00           SUBPART:   1.3

SECTION:   05 21 13           SUBPART:   1.3
```

The **Test / Requirements List** (**TSTRQLST.RPT**) includes all the **Test Requirements** cited in the text, along with the **Sections** and **Subparts** in which they can be found.

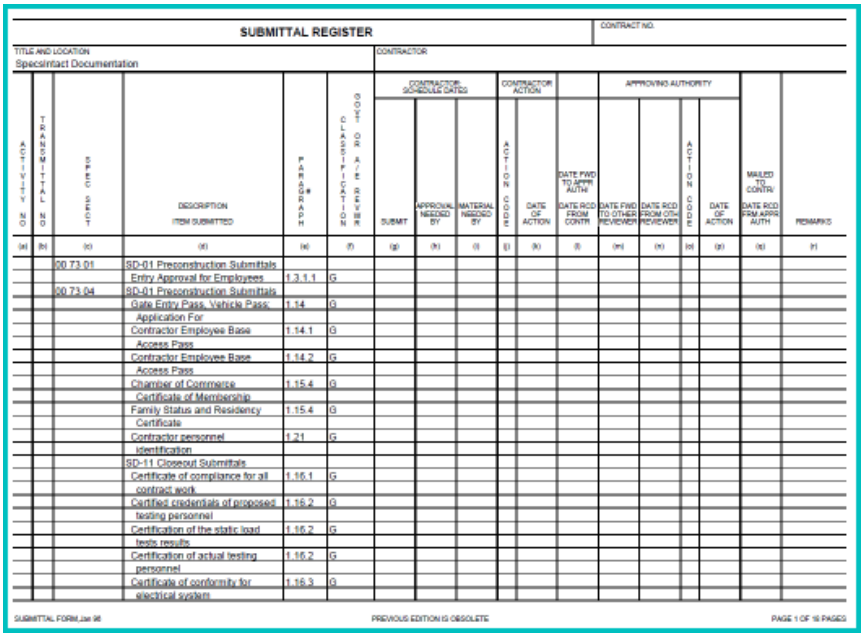
```
SECTION:   03 30 00           SUBPART:   2.8.4

Provide slump for concrete at time and in location of placement as follows:
```

The Submittal Register

The **Submittal Register** lists the **materials**, **products** or **items** for each Submittal cited in the Job, as well as the **Section** and **paragraph number** locations, and any **required approval**.

When the Submittal Register is generated, the system:

- *Searches* for the **Submittal Article** within **PART 1** of each Section.
- *Locates* all tagged **Submittal Descriptions** (**SDs**) listed in each Section's Submittal Article.
- *Locates* the **Submittal Items** appearing below the SDs <u>and</u> throughout the Sections.
- *Generates* the **Submittal Register** and *inserts* the **Subpart** location for each **Submittal Item** in the Sections' **text** (<u>outside</u> the Submittal Articles).



SUBMITTAL REGISTER — CONTRACT NO.

TITLE AND LOCATION: SpecsIntact Documentation — CONTRACTOR

ACTIVITY NO	TRANSMITTAL NO	SECT PART	DESCRIPTION ITEM SUBMITTED	PARAGRAPH #	CLASSIFICATION GOVT OR A/E REVIEWER	CONTRACTOR SCHEDULE DATES: SUBMIT	APPROVAL NEEDED BY	MATERIAL NEEDED BY	CONTRACTOR ACTION: ACTION CODE	DATE OF ACTION	DATE FWD TO APPR AUTH	APPROVING AUTHORITY: DATE RCD FROM CONTR	DATE FWD TO OTHER REVIEWER	DATE RCD FROM OTH REVIEWER	ACTION CODE	DATE OF ACTION	MAILED TO CONTR	DATE RCD FRM APPR AUTH	REMARKS
(a)	(b)	(c)	(d)	(e)	(f)	(g)	(h)	(i)	(j)	(k)	(l)	(m)	(n)	(o)	(p)	(q)	(r)	
		00 73 01	SD-01 Preconstruction Submittals															
			Entry Approval for Employees	1.3.1.1	G													
		00 73 04	SD-01 Preconstruction Submittals															
			Gate Entry Pass, Vehicle Pass	1.14	G													
			Application For															
			Contractor Employee Base	1.14.1	G													
			Access Pass															
			Contractor Employee Base	1.14.2	G													
			Access Pass															
			Chamber of Commerce	1.15.4	G													
			Certificate of Membership															
			Family Status and Residency	1.15.4	G													
			Certificate															
			Contractor personnel	1.21	G													
			identification															
			SD-11 Closeout Submittals															
			Certificate of compliance for all	1.16.1	G													
			contract work															
			Certified credentials of proposed	1.16.2	G													
			testing personnel															
			Certification of the static load	1.16.2	G													
			tests results															
			Certification of actual testing	1.16.2	G													
			personnel															
			Certificate of conformity for	1.16.3	G													
			electrical system															

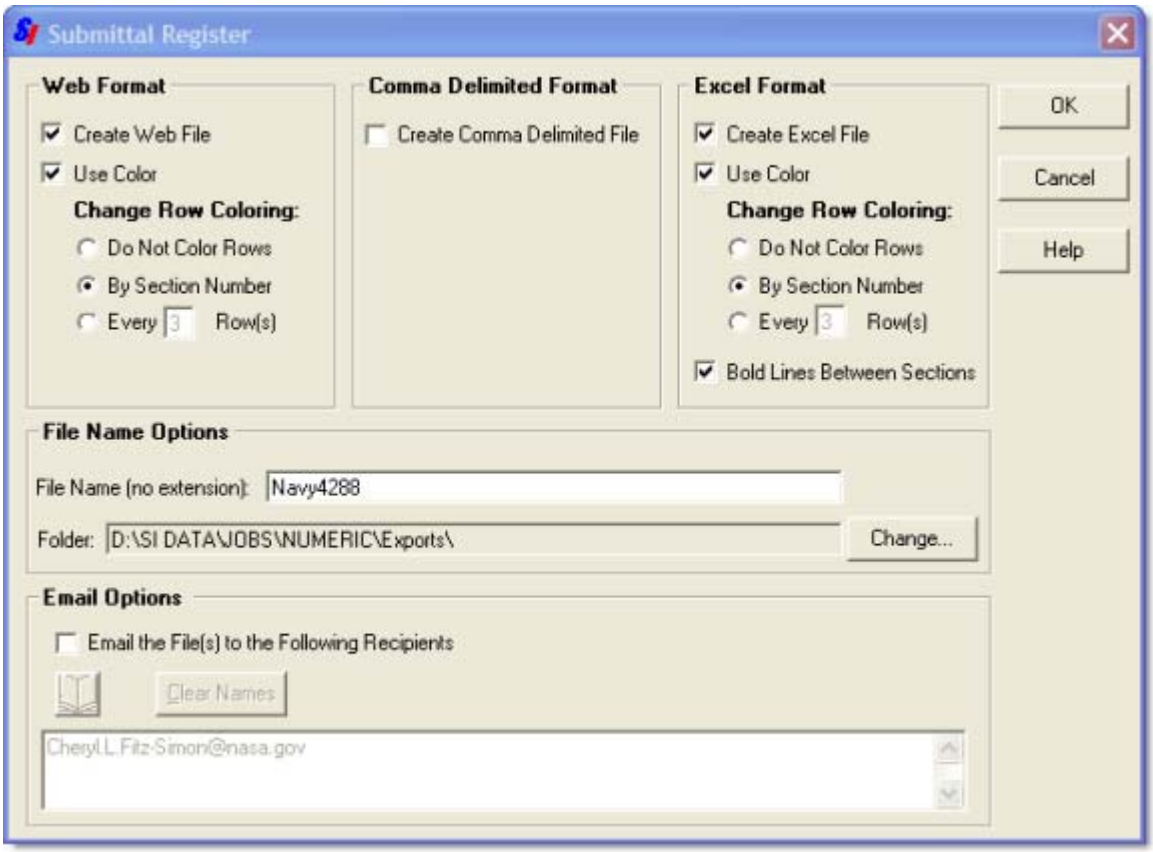
SUBMITTAL FORM Jan 98 — PREVIOUS EDITION IS OBSOLETE — PAGE 1 OF 16 PAGES

The Submittal Register <u>does not</u> appear in the **SI Explorer's Processed Files** folder the way the other reports and lists do. It will, however, print when you choose **Process & Print**. If you are publishing to PDF, it <u>will</u> appear in the **PDF Files** folder in the SI Explorer, and you can view it in that format.

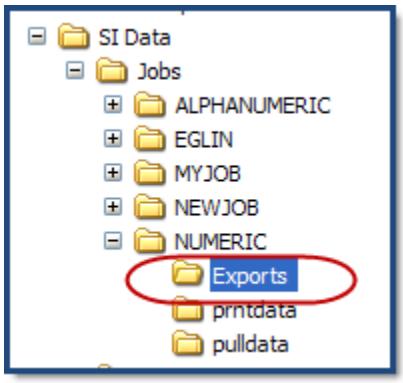
Troubleshooting the Submittal Register	
Problem	**Cause**
Column (f) Classification Government or A/E Reviewer has double **G G**	The **Submittal Item** is listed <u>twice</u> in the **Submittal Article** under the same **Submittal Description**.
Column (e) Paragraph # is blank	The **Submittal Item** is <u>only found</u> in the **Submittal Article** and is not used anywhere in the Section's text.
A/E appears in **Column (d)** instead of **Column (f)**.	Classification **G** must <u>precede</u> Reviewer as follows: **_{G A/E}**
FIO appears in **Column (d)** instead of **Column (f)**.	FIO is <u>no longer recognized</u> on the **UFGS Submittal Register** and <u>should not be used</u> in the **Submittal Article**.

The Submittal Register Output Options

SpecsIntact v4.4.2 and newer offers three output options in addition to the SpecsIntact printed Submittal Register. The First, provides output to a **Web Format**, the second, to a **Comma Delimited Format** and the third to a **Microsoft Excel Format**.



All three Output Formats can be generated at the same time or separately. These files require Windows Explorer in order to access them, and are located in the Jobs Working Directory, Exports folder as illustrated.



On the next few pages we're going to learn how to fix Validation Errors. The Validation Errors are generated through the SpecsIntact Editor when tagging mistakes are made. We'll illustrate some of the more common Validation Errors and guide you through correcting them.

Before you begin correcting **any** Reports generated by SpecsIntact you should familiarize yourself with the **Helpful Hints** listed below! Knowing these techniques will make locating and correcting problems much easier!

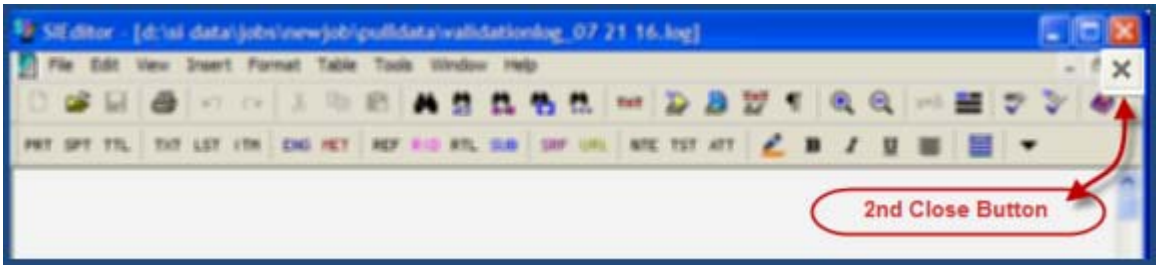
How do I validate my Section File?

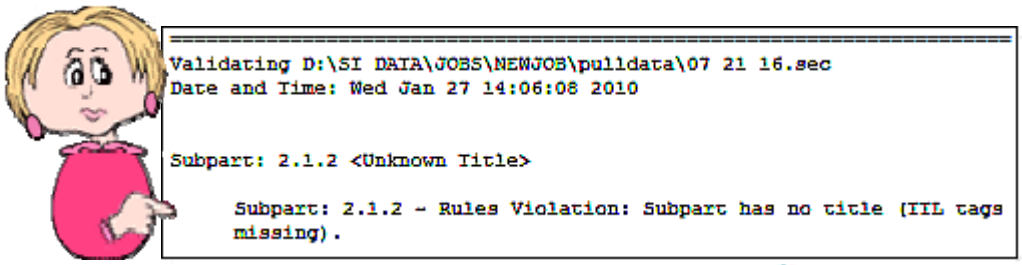
There's several ways to invoke the Validation. This can be done by saving the Section file, selecting **Tools | Validation** or *selecting* the **Editor's Toolbar Validation button**.

Helpful Hints that apply to resolving problems on any of the Reports:

1. *Double-click* any **Section number** within a Report to open that Section in the Editor. Your cursor will be placed at the **Subpart** containing the problem. Tags are automatically hidden when you use the hyperlinking from the Reports, but before making any changes, display the tags on your screen to ensure accuracy.
2. Display the **Marks** to check spacing — each space will be represented by one dot on the screen. Show Marks using the command on the Editor's **View** menu or the corresponding button on the toolbar.

3. Always check first to see if the problem is the result of a typographical error.
4. Use the second Close button within the Editor to close the report and return you to the Section File, as illustrated below or vice versa





```
==========================================================================
Validating D:\SI DATA\JOBS\NEWJOB\pulldata\07 21 16.sec
Date and Time: Wed Jan 27 14:06:08 2010


Subpart: 2.1.2 <Unknown Title>

     Subpart: 2.1.2 - Rules Violation: Subpart has no title (TTL tags
     missing).
```

Resolving Subpart Has No Title

To learn more about proper editing, refer to the section entitled "Editing Techniques" at the beginning of this Chapter!!

This error is a result of deleting the Title and Text rather than the entire Subpart. Often this is caused by highlighting incorrectly or editing without tags showing. As illustrated below, see how the beginning DEL tag is just in front of the TTL tag? This is **INCORRECT**! The beginning DEL tag should be in front of the SPT Tag.

Before:

Wrong Location

<SPT =1.4.1>1.4.1 ~~<DEL><TTL>Delivery</TTL>~~

~~<TXT>Deliver materials to the site in original sealed wrapping bearing manufacturer's name and brand designation, specification number, type, grade, R-value, and class. Store and handle to protect from damage. Do not allow insulation materials to become wet, soiled, crushed, or covered with ice or snow. Comply with manufacturer's recommendations for handling, storing, and protecting of materials before and during installation.</TXT></DEL>~~

Wrong Location

Now that all three agencies require Revisions to show the Added and Deleted text, SpecsIntact automatically turns them on when creating new projects. Keep in mind the same editing techniques can be used whether you are editing with Revisions or not!

There are two ways to correct this problem.

- Place the cursor on the left side of the beginning **SPT** tag and *press* the **Shift** and **Delete keys**

OR

- Use the **Double-Click Method** until the selected region encompasses the entire Subpart (SPT Tags), then *press* the **Delete** key

Highlighting Illustration

```
<SPT =1.4.1>1.4.1   <TTL>Delivery</TTL>

     <TXT>Deliver materials to the site in original sealed wrapping bearing
     manufacturer's name and brand designation, specification number, type,
     grade, R-value, and class.  Store and handle to protect from damage.
     Do not allow insulation materials to become wet, soiled, crushed, or
     covered with ice or snow.  Comply with manufacturer's recommendations
     for handling, storing, and protecting of materials before and during
     installation.</TXT>

</SPT =1.4.1><SPT =1.4.2>1.4.2   <TTL>Storage</TTL>
```

After:

Right Location

~~<DEL><SPT =1.4.1>1.4.1 <TTL>Delivery</TTL>~~

~~<TXT>Deliver materials to the site in original sealed wrapping bearing manufacturer's name and brand designation, specification number, type, grade, R-value, and class. Store and handle to protect from damage. Do not allow insulation materials to become wet, soiled, crushed, or covered with ice or snow. Comply with manufacturer's recommendations for handling, storing, and protecting of materials before and during installation.</TXT>~~

Right Location

~~</SPT =1.4.1></DEL>~~<SPT =1.4.1>1.4.1 <TTL>Storage</TTL>

I have looked at this problem in my Section, everything looks fine but I'm still getting a Validation Error for Unknown Title, what could be wrong?

There is one other problem that will result in an **Unknown Title** error that we haven't covered yet! Verify the Title is surrounded by a set of **TTL** tags, If not, you will need to insert the tags around the Title.

Beginning 'TTL' Tag is missing!

Ending 'TTL' Tag is missing!

```
<SPT =2.1>2.1    <SUB>BLOCK OR BOARD INSULATION</SUB>
```

In this illustration, the Title also has a Submittal Item, so make sure you encompass the SUB tags when you highlight, then select the **TTL** Button on the Toolbar!

```
<SPT =2.1>2.1    <TTL><SUB>BLOCK OR BOARD INSULATION</SUB></TTL>
```

Resolving 'SPT' Cannot Contain 'ORG', 'RID' or 'RTL' Errors

```
=================================================================
Validating D:\SI DATA\JOBS\NEWJOB\pulldata\07 21 16.sec
Date and Time: Tue Feb 02 12:57:35 2010


Subpart: 1.1   REFERENCES

     Subpart: 1.1 - Rules Violation: 'SPT' Cannot Contain 'ORG'.
     Subpart: 1.1 - Rules Violation: 'SPT' Cannot Contain 'ORG'.
     Subpart: 1.1 - Rules Violation: 'SPT' Cannot Contain 'RID'.
     Subpart: 1.1 - Rules Violation: 'SPT' Cannot Contain 'RID'.
     Subpart: 1.1 - Rules Violation: 'SPT' Cannot Contain 'RTL'.
     Subpart: 1.1 - Rules Violation: 'SPT' Cannot Contain 'RTL'.
     Subpart: 1.1 - Rules Violation: 'SPT' Cannot Contain 'RID'.
     Subpart: 1.1 - Rules Violation: 'SPT' Cannot Contain 'RID'.
     Subpart: 1.1 - Rules Violation: 'SPT' Cannot Contain 'RTL'.
     Subpart: 1.1 - Rules Violation: 'SPT' Cannot Contain 'RTL'.
     Subpart: 1.1 - Rules Violation: 'SPT' Cannot Contain 'RID'.
     Subpart: 1.1 - Rules Violation: 'SPT' Cannot Contain 'RID'.
     Subpart: 1.1 - Rules Violation: 'SPT' Cannot Contain 'RTL'.
     Subpart: 1.1 - Rules Violation: 'SPT' Cannot Contain 'RTL'.
     Subpart: 1.1 - Rules Violation: 'SPT' Cannot Contain 'RID'.
     Subpart: 1.1 - Rules Violation: 'SPT' Cannot Contain 'RTL'.
     Subpart: 1.1 - Rules Violation: 'SPT' Cannot Contain 'RTL'.
     Subpart: 1.1 - Rules Violation: 'SPT' Cannot Contain 'RID'.
     Subpart: 1.1 - Rules Violation: 'SPT' Cannot Contain 'RID'.
     Subpart: 1.1 - Rules Violation: 'SPT' Cannot Contain 'RTL'.
     Subpart: 1.1 - Rules Violation: 'SPT' Cannot Contain 'RTL'.
```

Although the Validation Report reflects a number of errors, inserting one tag can resolve all the problems!

Since the Reference Article can list anywhere from one or more Reference Organizations, you may find yourself correcting the tagging at the beginning, middle or end of the Reference Article.

Illustrated below the Reference Organization is located in the middle of the Reference Article! If this Reference had been the first one listed, there would not be an ending REF tag preceding the beginning ORG tag as shown.

Before:

Beginning Reference 'REF' Tag is missing!

```
</REF> <ORG>NATIONAL FIRE PROTECTION ASSOCIATION (NFPA)</ORG>

<RID>NFPA 211</RID>            <RTL>(2006) Chimneys, Fireplaces, Vents, and
                               Solid Fuel-Burning Appliances</RTL>

<RID>NFPA 31</RID>             <RTL>(2006; Errata 2006; Errata 2007)
                               Installation of Oil Burning Equipment</RTL>

<RID>NFPA 54</RID>             <RTL>(2008) National Fuel Gas Code</RTL>

<RID>NFPA 70</R                L>(2008; AMD 1 2008) National Electrical Code
                               008 Edition</RTL>

 <REF>    <ORG>TECHNICAL ASSOCIATION OF THE PULP AND PAPER INDUSTRY (TAPPI)</ORG>
```

Ending Reference 'REF' Tag is missing!

Let's start correcting these problems.

Highlighting To Insert REF Tags

Start Here

```
</REF><ORG>NATIONAL FIRE PROTECTION ASSOCIATION (NFPA)</ORG>

<RID>NFPA 211</RID>                <RTL>(2006) Chimneys, Fireplaces, Vents, and
                                   Solid Fuel-Burning Appliances</RTL>

<RID>NFPA 31</RID>

<RID>NFPA 54</RID>

<RID>NFPA 70</RID>

<REF>    <ORG>TECHNICAL ASSO
```

End Here

The Reference Organization illustrated is missing the **REF** tags. By highlighting the entire Reference Organization including its Reference Identifiers and Titles you can insert the REF Tag correctly.

- **<u>Always</u>** start by placing the cursor on the left side of the beginning **ORG** tag, *press and hold* the **left mouse button** highlighting the text until you reach the following beginning **REF** tag as illustrated,
- Now that you have the area highlighted, *release* the mouse button then *select* the **REF** button on the **Tags Bar**. REF

After:

Right Location

```
</REF><REF><ORG>NATIONAL FIRE PROTECTION ASSOCIATION (NFPA)</ORG>

<RID>NFPA 211</RID>                <RTL>(2006) Chimneys, Fireplaces, Vents, and
                                   Solid Fuel-Burning Appliances</RTL>

<RID>NFPA 31</RID>                 <RTL>(2006; Errata 2006; Errata 2007)
                                   Installation of Oil Burning Equipment</RTL>

<RID>NFPA 54</RID>                 <RTL>(2008) National Fuel Gas Code</RTL>

<RID>NFPA 70</RID>                 <RTL>(2008; AMD 1 2008) National Electrical
                                   Code - 2008 Edition</RTL>

</REF><REF><ORG>TECHNICAL ASSOCIATION OF THE PULP AND PAPER INDUSTRY (TAPPI)</ORG>
```

Right Location

Now that we have learned how to insert the Reference tag around a Reference Organization at the beginning and middle of the Reference Article, let's learn how to correct the last one.

Before:

Beginning Reference 'REF' Tag is missing!

```
</REF><ORG>U.S. GREEN BUILDING COUNCIL (USGBC)</ORG>

<RID>LEED</                    <RTL>(2002; R 2005) Leadership in Energy and
                               Environmental Design(tm) Green Building
                               Rating System for New Construction (LEED-NC)</RTL>

</SPT =1.1><SPT =1.2>1.2    <TTL>DEFINITIONS</TTL>
```

Ending Reference 'REF' Tag is missing!

Remember essentially the steps for correcting this problem are the same as the one on the previous page. The only difference is that this Reference Organization is the last one in the Reference Article.

Highlighting To Insert REF Tags

Start Here

```
</REF><ORG>U.S. GREEN BUILDING COUNCIL (USGBC)</ORG>

<RID>LEED</RID>

</SPT =1.1><SPT =1.2>1.2    <T
```

End Here

The Reference Organization illustrated is missing the **REF** tags. By highlighting the entire Reference Organization including its Reference Identifiers and Titles you can insert the REF Tag correctly.

- **<u>Always</u>** start by placing the cursor on the left side of the beginning **ORG** tag, *press and hold* the **left mouse button** highlighting the text until you reach the following **ending SPT** tag as illustrated.
- Now that you have the area highlighted, *release* the mouse button then *select* the **REF** button on the **Tags Bar**. REF

After: Right Location

```
</REF><REF><ORG>MATERIAL HANDLING INDUSTRY OF AMERICA INC (MHIA)</ORG>

<RID>MHI MH16.1</RID>          <RTL>(2008) Specification for the Design,
                               Testing, and Utilizaion of Industrial
                               Steel Storage Racks</RTL>

<RID>MHI MH28.1</RID>          <RTL>(1997) Specification: Industrial Steel
                               Grade Shelving</RTL>

</REF></SPT =1.1><SPT =1.2><TTL>1.2   DEFINITIONS</TTL>
```

Right Location

By now, you are better equipped to correct these types of Validation Errors. Keep in mind the SpecsIntact Editor verifies several other types of tagging problems that can fail validation. If one of the other validations emerges and you are not sure how to fix them, contact our Technical Support Desk for assistance.

Backup Your Job

Using the **Backup** function to make a copy of your Job is a good idea any time — especially before executing Revisions, since once these marked changes are accepted, they are permanent and cannot be reversed by the Undo command.

1. From the SI Explorer's File menu, *click* Backup/Restore/Manage.
2. From the Backup screen, *click* the Jobs tab.
3. In the text box, *select* the Job you want to backup.
4. In the Include in Backup area of the dialog box, *check* the boxes if you want to backup any Processed Files, PDF Files, and Word Documents that are part of the Job.
5. In the Backup to (Destination) area of the dialog box, *choose* the Drive from the pull-down list.
6. In the Directory box, *click* to select the folder in which you want to save the backup.
7. If you want to create a new folder for the backup, add it to the end of the path by *typing* a backslash (\) and a folder name in the Backup Path text box.
8. In the Backup Type area, select either of the following:
   - Normal Format — Makes individual copies of all the files contained in the Job.
   - Archive (Zip) Format (*"Recommended"*) — Compresses all the files into a single file, requiring less space (required for the e-mailing function on the Restore/Send tab).
9. *Checking* the box for Delete Existing Files in Backup Directory will delete any type of files (not just previous backups) that already exist in that folder and should be used with extreme caution.

Restoring a Job From a Backup

Whether it's a Job in progress or a former Job, you may want to take an archived backup you've created through SpecsIntact and restore it. In addition, this is the same function you'll use when adding a downloaded Master to your default Working Directory and the SI Explorer.

1 From the **SI Explorer**, *click* the **File** menu and *choose* **Backup/ Restore/Manage**

2 *Click* the **Restore/Manage** tab.

3 In the **Restore From** area of the dialog box, *select* the **Drive**, **Folder** and **File** you want to restore.

4 The information about the backup chosen will be entered in the boxes on the right side of the screen. You may change the **Name** in the field (a name appearing in red indicates a project with that name already exists).

5 You can *choose* to:

◊ **Overwrite Existing** files, which will completely *remove* the files under this name in its original Working Directory and *replace* them with the backup files

or

◊ **Merge with Existing** files**,** which will both *replace* all files of the same names with the backup versions, and will also *add* any additional files in the backup that do not already exist in the Working Directory version.

6 *Click* **OK**.

You can only change the **Working Directory** destination if you change the **Name** of the project you are restoring.

Executing Revisions

Executing Revisions is one of the last phases of a project.

Make sure to backup the Job before Executing Revisions so you have a backup containing the Revisions!

To accept all the **Revisions** that you've marked throughout the **ENTIRE JOB** (both additions and deletions):

1. From the **SI Explorer**, *select* the **Job Folder** located in the left pane.
2. *Select* the **File** menu, *choose* **Execute Revisions**.
3. The **Confirm Selections to Execute Revisions** Dialog Box will *open* with all the Sections highlighted.
4. *Select* **OK** to **Execute Revisions** on the **Entire Job**.

To accept all the **Revisions** in selected **Sections**:

1. From the **SI Explorer**, *select* the **Job folder** in the left pane.
2. On the right pane, *select* one or more **Sections**.
3. *Select* **Sections Menu** and *choose* **Execute Revisions**.
4. The **Confirm Selections to Execute Revisions** Dialog Box will *open* with only the selected Sections listed and highlighted.
5. Click OK and the marked Revisions in only the Sections selected will become permanent.

Once the options listed above are done, the changes become **permanent**. These changes will now appear as regular text and will carry the attributes of the tags that enclose them.

After you Execute Revisions, the files that have been permanently changed by this function are temporarily displayed in the left pane of the SI Explorer in a folder called Revised Files, located under the Job folder. These are the actual Section files, so do not delete them from this folder or they will be permanently removed from your Job!

Job Checklist

- Make sure you have the most recent **Software** and **Masters**, and, if necessary, download newer versions from the SpecsIntact web site.
- Print the **Master Table of Contents with Scope** (which lists the Section numbers, Titles, and a brief description of each Section in the Master).
- Give this list to your project manager so the Sections necessary for the Job can be determined.
- When the project manager returns the list, print the Sections requested. Before printing them, ask whether they should show **English** or **Metric** Units of Measure, and make sure that you also show the **Notes**.
- Create the Job and add the Sections requested. Remember that the software will automatically add two Sections — **01 33 00** and **01 42 00** — which are necessary for processing the Job.
- Begin editing, and remember to always edit with **Tags** visible on the screen. You can also toggle on and off the **Marks**, **Notes**, and **Revisions** (if you're using Revisions). **Save** your Section often as you edit. When you do, it will produce a **Validation Report** that will flag certain mistakes (the Validation Report can be turned on or off from **Tools | Options | Save** screen).
- Use the **Process & Print/Publish** function to generate the **Reports** and perform **Reconciliation** (processing the entire Job for accuracy), and correct any errors or discrepancies found. Don't forget to rerun the reports after any changes and until all findings are resolved.
- Run a **Spell Check** after all changes are made.
- Visually check the formatting by toggling off all the screen elements. Check spacing and lines. Generally, you should have one blank line between paragraphs. Turn Tags and Marks back on before deleting any blank lines.
- Create the finished Job (selecting all the Reconciliation options) choosing the output file type desired — SI print (.**prn**) files can be sent directly to the printer, while **PDF** and **Word** files are only produced electronically. These files can be printed to paper through the SI Explorer. Remember the **Submittal Register** is not visible in the SI Explorer (except in PDF), nor is an .rtf cover sheet, and they cannot be produced if you are using Word for your output format.
- Don't forget to make a **Backup** of your Job.

Support Problems Encountered Commonly

"I think I am prepared to use SpecsIntact, but I have a few questions. Can I call tech support for assistance?"
— Shirley in Shreveport

Of course you can! The SI Tech Support staff will be happy to answer your questions. It's better to ask before you make a serious mistake than to wait until you've spent hours working on a Job, only to find out you need hours more to correct it. Don't forget to use the **Help menu** as you work, and to use the *SI web site* as a resource as well.

What you learned from this chapter:

- How to use tools, shortcuts and other techniques to edit more efficiently.
- There are specific rules regarding use of symbols and capitalization with the text.
- Using the results from the QA Reports help you locate problems in the Sections and fix them.
- Helpful information is provided when the various Lists are generated during processing.
- An archived Job can be restored using the SI Explorer.
- Using a Job checklist can help you make certain you've completed all the necessary steps to finish your Job.

Sally hopes you have found her guided tour helpful. If you have any comments or feedback regarding this guide, please feel free to pass them along to SpecsIntact Tech Support.

Blank

SpecsIntact

Learning Guide Series

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Back Cover

Trim for binder spine label

SpecsIntact

Quick Start!