SpecsIntact

User Guide

SpecsIntact v5.7.0

US Army Corps of Engineers

NAVFAC
Naval Facilities Engineering Systems Command

AIR FORCE CIVIL ENGINEER CENTER

About This User Guide

The **SpecsIntact User Guide** is designed to teach **SpecsIntact** users the concepts involved in successfully completing projects by fully utilizing all the tools provided in the **SpecsIntact** system.

This **User Guide** provides a basic introduction to many of the concepts in **SpecsIntact**. It will assist new users by giving them a fundamental understanding of **SpecsIntact**, but experienced users will also find it helpful as refresher material. It's not intended to give an in-depth explanation of every aspect of using **SpecsIntact**, but it is a good place to begin.

This **User Guide** does NOT cover the installation process and assumes that you already have both the **SpecsIntact** software installed and the **UFGS Master** text loaded on your computer system.

You are encouraged to use this **User Guide** in conjunction with the other user tools we provide, like the on-screen and searchable Help, eLearning Modules and our other website resources, which are all conveniently accessible from the **SpecsIntact Help** menus and our Support and Help Center website.

How to Use this User Guide

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

Along the way, we'll point out key information that you should remember and call your attention to things that you should avoid.

As you review the chapters in this **User Guide**, please note that before moving on to the next chapter, be sure you have a good understanding of the information, since the subsequent chapters will build on that knowledge.

Throughout this **User Guide**, we'll call your attention to important issues using the symbols noted below:

💡 **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: Proceed at your own risk. **Stop** - means *stop* - don't do it or you may regret it later!

eLearning Video: A portion of the topics covered in this manual are also available as short eLearning Videos on our website.

What Is SpecsIntact

SpecsIntact (SI) is an automated project management system for processing **UFGS Master** and other local Masters that are used in facility construction projects. **SpecsIntact** provides built-in quality assurance reports and automated functions that lets you adapt standardized facility construction specifications to fit your project. It is also a DoD requirement to use **SpecsIntact** software to produce construction specification projects in all three DoD agencies: U.S. Army Corps of Engineers (USACE), the U.S. Naval Facilities Engineering Command (NAVFAC) and the U.S. Air Force Civil Engineer Center (AFCEC).

SpecsIntact is used worldwide by USACE, NAVFAC and USAF.

A Brief History of **SpecsIntact:**

- **1965** - Conceived by NASA
- **1986** - Adopted by NAVFAC
- **1988** - Adopted by USACE
- **2023** - The SI Project transitioned from NASA to USACE.

SpecsIntact makes it possible to assure quality control for project specifications from beginning to end.

The **SpecsIntact** system is managed by the Corps of Engineers Huntsville Engineering and Support Center (CEHNC). **SpecsIntact** is used by engineers, architects, specification writers, project managers and construction managers doing business with the three supported government agencies: Army, Navy and Air Force.

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. **SpecsIntact** utilizes the latest **UFGS Master** Sections, which are complete, inter-agency guide specifications.

Everything a Project Specifier could possibly need to include in a particular Section or project, and that may be required by a particular agency (Army, Navy, or Air Force) is contained in a **UFGS Master** Section. They are called **Master Guide Specifications** for a reason. Using these Masters, you adapt their content to your project by editing them in the **SpecsIntact Editor**. The idea is to pull the applicable Sections for your project into a **SpecsIntact** Job. After that, you can edit the **Master Guide Spec** Sections as is applicable to your projects' specific needs without affecting the **UFGS Master** Sections.

When upgrading the software, **SpecsIntact** will not delete or modify your existing Jobs or Masters. Even if you completely uninstall **SpecsIntact**, your **Jobs** and **Masters** folders will remain, and stay **intact**. Additionally, all the existing Working Directories will also be preserved and automatically connected.

SpecsIntact and UFGS

The **SpecsIntact (SI)** Software and the **Unified Facilities Guide Specifications (UFGS)** work together to create an up-to-date and complete guide specification for all types of construction projects.

> The **UFGS Master** Sections are published only in electronic format and are intended to be used with **SpecsIntact** software.

> It is important to start with the latest **UFGS Master** Sections so that you have the most up-to-date Sections at the start of a new Job. These are released four times per year in February, May, August, and November on the 4th Thursday of that month.

> For directions on how to install and setup the **SpecsIntact** software and to obtain the latest **UFGS Master** refer to the **Installation Guide** on our Support and Help Center webpage.

One of the first basics you should know about **SpecsIntact** is that it is referred to as a system rather than just software. It is two software applications working together:

- **SpecsIntact (SI) Explorer** - Main window used to manage Jobs (projects)
- **SpecsIntact (SI) Editor** - Specification Section Editor

SpecsIntact allows you complete control of your projects - choosing the specifications you need from the latest standard guide specifications known as the **UFGS Master** Sections. These Master Section specifications are pulled into project specifications and then edited to pertain to a particular project. This means a Project Specifier doesn't have to start from scratch every time they begin a new project.

In **SpecsIntact** we refer to these projects as Jobs. Once preliminary edits have been made to the specification Section in a Job, **SpecsIntact** has several automated processes and quality control reports, which provide checks and balances for those edits. To finish it up, you can choose to produce your completed specifications in a choice of three output formats – **SpecsIntact** specification print (.prn) files, PDF, or MS Word.

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

UFGS Master Specification Reference Documents

There are two main reference documents that the **UFGS Master** Sections conform to:

1. **CSI MasterFormat Section List**: Contact your designated agency Dataset Manager for information on licensing for this manual: https://www.csiresources.org/home. All **UFGS Master** Section Numbers and Titles follow the **CSI MasterFormat** rules, so please refer to those rules when numbering and titling a new Section, or re-numbering an existing Section.

2. Refer to the **Unified Facilities Supplement (UFS)** UFS 1-300-02 document which is the standard used for all Section formatting guidance for the preparation of **Unified Facilities Guide Specifications (UFGS) Master Specifications**.

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 somewhat unique to **SpecsIntact** (e.g., Jobs (aka Projects), Masters, Sections, Tags, Working Directories, Reconciliation, Subparts (aka Articles/Paragraphs), Tailoring, etc.) Other terms are industry-related and may already be familiar to you (e.g., Submittals, References, Reports), 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 meanings in **SpecsIntact**. For example, while working in a Microsoft Word document, you might say that you're having trouble with a Section, referring to a portion of the document. However, when working in **SpecsIntact**, a Section refers to the entire document, while its content is composed of Parts and Subparts.

SpecsIntact utilizes specification Sections contained in the Unified Facilities Guide Specifications (UFGS) Master database. This is where the term Master comes from. The **UFGS Master** is comprised of forty-eight (48) 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.

💡 To learn more about **SpecsIntact** terminology, refer to the Terminology topic in the Web-Based Help.

SpecsIntact Tagging - Foundation for Processes and Reports

SpecsIntact uses a special tagging system like the HTML code that tells a web browser how to display a web page. **SpecsIntact** uses these applicable tags to identify what a Reference (RID), Submittal (SUB), Section Reference (SRF), Tailoring Option (TAI), etc. components are. This is also how the **SpecsIntact** Verification reports and Reconciliation processes can run and verify the accuracy of these components, requirements and processes. This helps reduce the time spent manually QA'ing and completing your project.

💡 To learn more about **SpecsIntact** tags, refer to the SpecsIntact Tags topic in the Web-Based Help**.**

Correct tagging of these components is critically important. The tagging and Section structure is discussed in more detail later in this **User Guide**. As shown above, some of the most important component tags are also color-coded (including the text inside them). This makes them easy to identify even when you are not viewing or printing the Section with tags showing.

SpecsIntact System

It's important to understand the normal workflow when creating, editing and processing a **SpecsIntact** Job, starting with understanding that there are two main component programs of the **SpecsIntact** system: The **SI Explorer** and the **SI Editor**.

SI Explorer

It is through the **SI Explorer** that you accomplish all the project management functions, from putting together the specifications Sections you need for your project, creating a Job, 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.
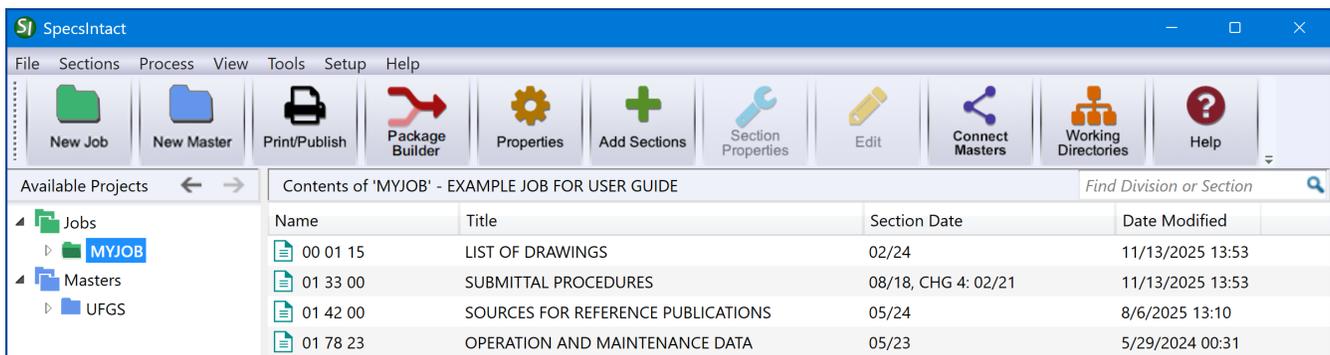
Two common features in **SpecsIntact** that work in the **SI Explorer** window are drag-and-drop and right-clicking. For example:

1. In the **SI Explorer**, you can add Sections to your Job by dragging them from either the Windows File Explorer, a Master, an Email or from another Job then dropping them in the destination Job folder. This also works in reverse, as you can drag-and-drop them from a Job or Master into an Email, a Windows File Explorer folder, etc.

2. To access common commands in **SI Explorer**, simply right-click on a Job or Master name, or a Section, and select options from the resulting pop-up menu**.**

We will explain more of the **SI Explorer** functions and how to use them later in this **User Guide** as we review how to navigate this system in more detail.

For additional guidance, watch the eLearning modules within **Chapter 2 - Creating a Job and Adding Sections** and **Chapter 8 - Additional Tools and Techniques.**

SpecsIntact Folders and Files

You'll see two main types of folders displayed in the **SI Explorer**: **Jobs** and **Masters**.

Jobs are created under the **Jobs** folder, while any connected Masters are located under the **Masters** folder. When you create a Job, you will essentially be copying specification Sections from a Master (usually the **UFGS Master**) into your created Job.
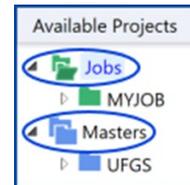
The type of files you edit in **SpecsIntact** are called Sections — when you see them on your computer system, they have a file extension of (.sec). **UFGS Master** Sections are formatted with the tagging scheme necessary for **SpecsIntact's** automated features to work. However, you must edit the content of each Section to fit your specific project.

You can set up the contents of some default categories in the **Properties for Job** window then choose which of those categories to display as **Column Headers** in the **Contents** panel.

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 that will reside in applicable subfolders under your Job folder. The Section (.sec) files are always the underlined editing copy from which the others are produced.

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

Working Directories and Connect Masters

There are two menu items available from the **SI Explorer Setup** menu that control which Masters and Jobs are connected/displayed in the left pane of the **SI Explorer**.

Use the **Working Directories** button to choose the folder location(s) of the Jobs you want to be visible.

Use the **Connect Masters** button to choose the folder location(s) of the available Masters you want to be visible.

These two options can be used at any time to change the Working Directory folders that contain your Jobs and Masters.

! You can only view the Jobs or Masters if the folders they are located in are connected in the **Working Directories** window.
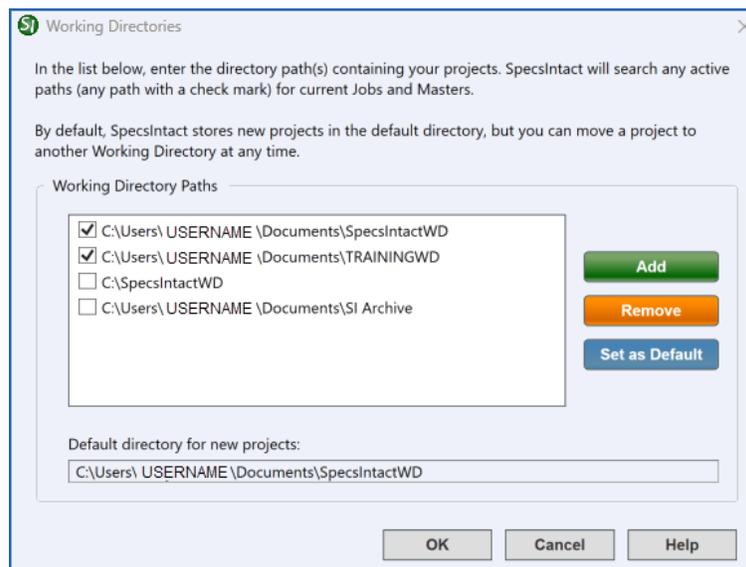
For additional guidance, watch the eLearning modules within **Chapter 1 - Getting Started**.

SI Editor

The **SI Editor** is where you edit your specification Sections. Although it is much more than a word processor, it does have many of the same standard features which you are probably already familiar with. 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 **SI Editor** is opened by default when you select a Section to edit in the **SI Explorer**.
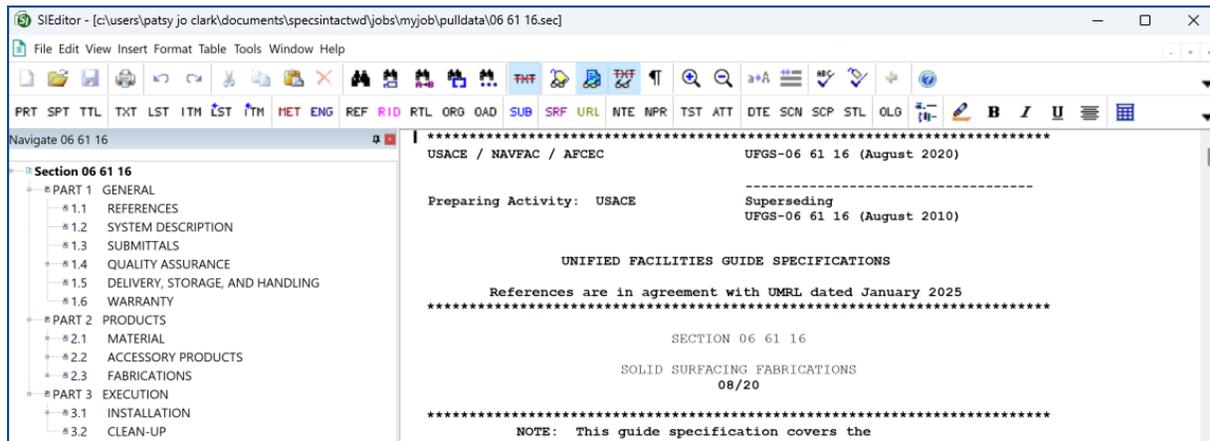
💡 The only file type that is ever edited in **SpecsIntact** is the Section (.sec) file.

ℹ️ Additional information and instructions on editing sections within the **SI Editor** can be found in the Proper Editing Practices in the SI Editor topic in this guide. This topic covers the **SI Editor's** most essential functions and features.

🎞️ For additional guidance, watch the eLearning modules within **Chapter 3 - Editing.**

Print/Publish (Output) Files

Printing in **SpecsIntact** is done in the **SI Explorer** window via the **Print/Publish** 🖨️ button. You can print selected Sections or all Sections in a Job or Master.

When you process and print a Job, you produce print versions of the Section (.sec) files which become the Processed (.prn) files. The print versions of the Sections are generated per your preferences at time of printing (e.g., with or without Tags, with or without Notes, etc.), leaving the Section (.sec) files completely intact per your edits. After you have run the Print/Publish processes, the Processed (.prn) files are then displayed in the **Available Projects** panel on the left side of the **SI Explorer** in the **Processed Files** folder under the Job name. Just like the **Jobs** folder, clicking a subfolder displays its contents in the **Contents** panel on the right. If you need to make further edits, you must always edit the Section (.sec) file (directly under the Job name folder), not the (.prn) files or (.rpt) files in the **Processed Files** folder. When you process your Sections again, any new processed files will replace any previous Processed (.prn) and/or Report (.rpt) files.

Publish to PDF or Word

You can also produce processed files in two other popular formats: PDF and Microsoft Word. To publish Sections to Word, you must have MS Word installed on your system. The **SpecsIntact PDF Printer** is available and recommended to be installed during the **SpecsIntact** installation process to utilize the best PDF publishing options. The generated Word or PDF files are placed in the **SI Explorer**, under that Job Name under their applicable subfolder.

Once I've processed and printed to Word, can I edit my Sections in Word? Only for markup purposes, as the edits made in the Word document will need to be handed back to someone to incorporate the noted changes in the **SpecsIntact** Section files.

The Word and PDF output files <u>cannot</u> be returned to or edited in **SpecsIntact**. These formats will not contain any of the **SpecsIntact** tagging or quality controls and are truly only used for producing a final copy of your specifications in these alternate formats.

Additional information on publishing to PDF and Word can be found in their respective topics under the <u>Print Processing Window and Option Tabs</u> topic in this guide.

For additional guidance, watch the <u>eLearning</u> modules within **Chapter 4 - Process and Print/Publish**.

Pre-Job Checklist and Guidance Notes

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

1. Make certain you are using the most recent **UFGS Master** specifications at the start of the Job.

    To check that you have the latest **UFGS Master**, *open* the **SI Explorer** and *select* the **Help** menu at the top of the window (<u>not</u> the big Help button) and *select* **Check Current UFGS Version**.

2. *Print* the **UFGS Master** Table of Contents <u>with Scope</u> to PDF from the **Print/Publish** button on the **Reports** tab. Then *forward* the file (SCOPE.PDF) to the engineer on the project so they can decide which Sections they would like to include in their Job.

    After printing the Table of Contents with scope file (SCOPE.PDF), you can find it in the **SI Explorer** under the **Masters** > **UFGS** > **PDF Files** folder.

3. Based on this **UFGS Master** Table of Contents, the engineer should then give you a list of Sections to be included in the Job so you can then *create* the new Job and *add* those Sections to it.

4. **UFGS Master** Section 01 33 00 Submittal Procedures and 01 42 00 Sources for Reference Publications are both required to be included in all Jobs, so be sure to *add* them to the project even if the engineer neglects to include them.

Since they are required, **UFGS Master** Sections 01 33 00 and 01 42 00 are both added by default in the **Add Sections** window when creating a new Job.

Pre-Printing, Markup and Editing Considerations and Questions

At this point, you should have already created the Job with the Sections selected by the engineer. However, you now need to ask the engineer some questions and get some pre-editing information before printing the Sections for markup.

1. *Run* the **Export Tailoring for Job** function to produce the Tailoring Options list in one of the available file formats (web, spreadsheet, or comma-delimited). This export file contains a list of all the Tailoring Options in every Section of the Job. Once this list is produced, *send* it to the engineer to pre-edit the list prior to sending the Section files out for markup.

   To *generate* the Tailoring Option file, *right-click* on the Job name, *select* **Export Tailoring for Job** and *select* one or more file formats to *export* the Tailoring Option list to. Once exported, the exported file(s) will appear in the **Exported Files** folder under the Job name (e.g., TailoringOptionData.xlsx).

   This is important so you can remove/hide all the unwanted Tailoring Options from the Sections files in the Job before you print them for markup and editing. This is a very helpful and time-saving tool, as it provides less information (text) for the engineer and the person editing the Sections to have to review.

   a. Once you receive the marked up Tailoring Option report back from the engineer, *right-click* on the Job and *select* **Tailor Job**. When the **Tailoring Options** window appears, *uncheck* the Tailoring Options to be removed/hidden from the Job Sections. *Click* **OK** to remove the unchecked Tailoring Options.

   Additional information on Tailoring Options can be found in the Tailoring Option Tags topic in this guide.

   For additional guidance, watch the **Export Tailoring Options List** eLearning module within **Chapter 8 - Additional Tools and Techniques**.

2. Determine if **English**, **Metric** or **Both** units of measure will be used for this Job.

💡 Both units of measurement are not recommended to be used in a Job, as they are not always an exact match and can sometimes cause confusion during a project.

Print Recommendations for Sections Prior to First Markups

After completion of pre-tailoring edits and determining which units of measure will be used, there are additional important options that need to be considered when printing Sections for the first round of markups.

1. *Click* on the Job name. Then, *click* on the **Print/Publish** 🖨 Print/Publish button in the **SI Explorer.** Next, you'll be *selecting* the following reports and options to be applied to your published Sections:

    a. On the **Sections** tab, *select* **All Sections** (if not already *selected* by default).

    b. On the **Reports** tab, *place* a check next to the following options:

      • Under **Reports**, *select* **Submittal Register**.
      • Under **Project Table of Contents**, *select* **Include without scope**.
      • Under **Section Table of Contents**, *select* **Include without scope**.

    c. On the **Options** tab, under **Show**, *place* a check next to the following options:

      • **Section Dates**
      • **Notes**

    ⓘ Printing with the Specifier Notes prior to the first round of markups is highly recommended as each UFGS Section provides important information and guidance for the specifier as they mark up the Section (e.g., the Specifier Note above every '1.X SUBMITTALS' Subpart provides guidance on how to mark up the Submittals as it pertains to the agency you are processing the specification project for).

      • **Color (when using color printer)**
      • **Tailoring tags (when hiding tags)**
      • **Units of measure for the project**

d. On the **Header/Footer** tab, it is recommended to put some identifying text in the header (e.g., Original Job Sections for Markup, First Markup Sections, etc.) or whatever you deem appropriate to identify these Sections as your original Sections, along with the date.

First header line (left, center, right):

| {jobtitle} | | ORIGINAL JOB SECTIONS |

Second header line (left, center, right):

| | | {mm/dd/yy} |

e. For best results, it is preferred for you to use the **SpecsIntact PDF** as your printer. Even when publishing to Word, **SpecsIntact** first publishes to PDF, then converts those PDF files to Word files.

f. *Print* all Job Sections with the selected options by *clicking* on the green **Process & Publish** [Process & Publish] button to generate the applicable files.

g. Once all the necessary files are generated, *send* the published PDF or Word files to the architects or engineers to begin initial redlined markups. These files will be located under the appropriate subfolder under the Job name. Also send the Project Table of Contents (PROJECT.PDF) and the Submittal Register (REGISTER.PDF) for the project.
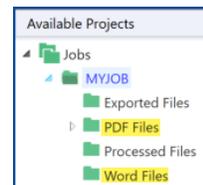
The **Project Table of Contents** and the **Submittal Register** reports can only be produced in PDF format, not Word.

If you prefer to *zip* all the PDF or Word file Job Sections in one file, instead of *dragging and dropping* them all as separate files into an email, you can easily *right-click* on the **PDF Files** folder or **Word Files** folder, then *select* **Open in Windows Explorer**. This will quickly jump you right into that folder in the Windows File Explorer so you can *select* the files and *zip* them up.

Additional information on all the available print options can be found under the Print Processing Window and Option Tabs topic in this guide.

For additional guidance, watch the eLearning modules within **Chapter 4 - Process and Print/Publish**.

Pre-Editing Questions

Before you begin to incorporate any edits into the Job Sections in **SpecsIntact**, there are some additional considerations and questions the engineer/specifier should address **before you begin editing**:

1. Is it required that you track the changes as you are editing? If so, the **SI Editor** provides the Use Revisions function in the **SI Editor** for this task which is explained in detail under that topic in this **User Guide**. This is similar to the 'Track Changes' function in Microsoft Word.

2. Would you like to pre-edit the Job Sections based on the included 'Tailoring Options' document in all the UFGS Sections? If so, see the Using Tailoring Options to Pre-Edit a Job topic in this **User Guide** for guidance on how to provide this comprehensive list to the specifier.

3. Which unit of measure is being used in this new Job/project? English or Metric? You can select the applicable one in the **Job Properties** window. The default for new Jobs is English, so you will not have to worry about changing it unless Metric units will be used. NOTE: There is an option to select both English and Metric, however, this is not a recommended option, as the conversion from one to the other is not exact.

SpecsIntact Workflow - Creating and Publishing a Job

Now that you have some basic understanding of the information needed for your Job, you can proceed with creating and publishing it. Below steps you through the basic life cycle of a **SpecsIntact** Job, beginning with creating a new Job and ending with publishing it.

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.

Start →
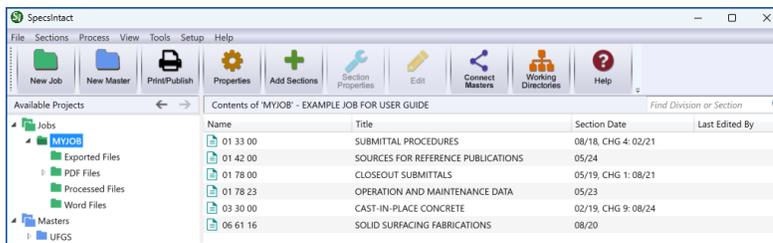
Open the **SI Explorer.**

Click the **New Job** button on the Toolbar.

→

The **Create New Job** window opens.

Fill in the **Job name** and **Title** fields as applicable. *Click* **OK**.

ⓘ Additional information for filling out the Job fields here can be found under the Properties for Job Window topic in this guide.

The **Add Sections** window opens.

Check the Sections you need and *click* the green **Add** button to add them to the **Contents of Job** pane below, then *click* **OK** at the bottom to add the Sections to your Job.

Additional information on adding Sections can be found under the Adding Sections to a Job topic in this guide.
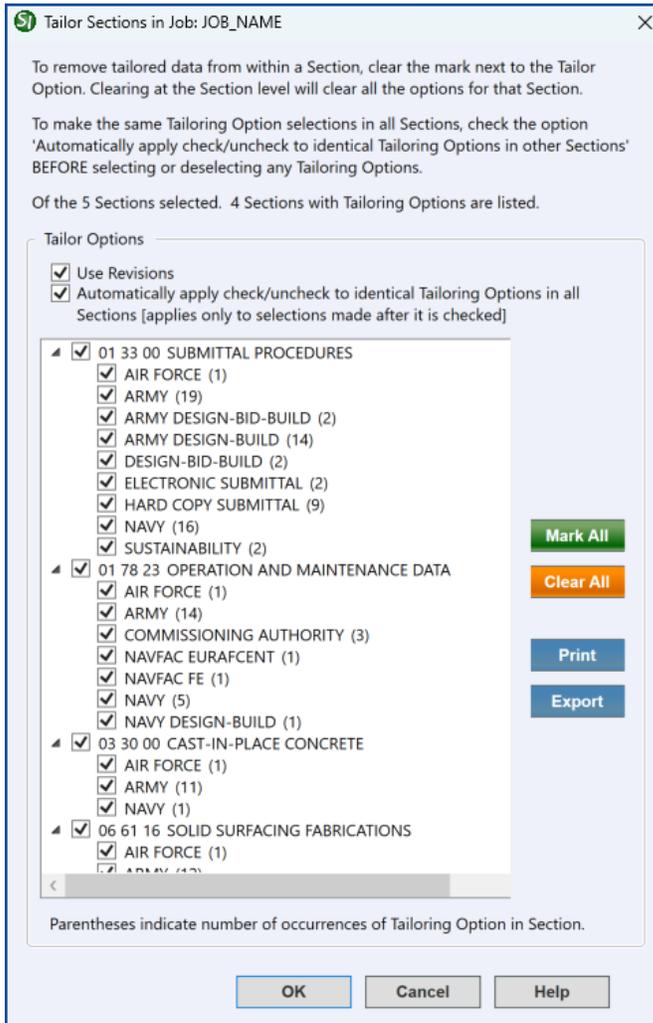
The **Tailor Sections in Job** window opens as soon as Sections are added to the Job. This window shows all the Tailoring Options contained in all the Sections of the newly created Job. From here, you can globally choose to *keep* or *remove* specific Tailoring Options for the entire project. To remove/hide an option, *uncheck* the box beside it.

Once your selections are complete, *click* **OK** to apply them, or *click* **Cancel** to skip for now.

Additional information on Tailoring Options can be found under the Tailoring Option Tags topic in this guide.

Use the **SI Explorer** to *open* a Section for editing in the **SI Editor** by *double-clicking* on a section.
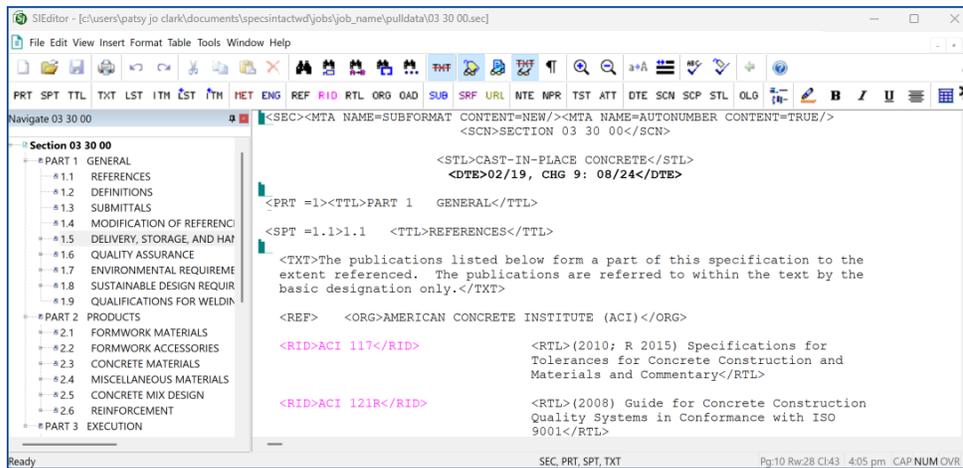
SI Editor

All edits are made to the Sections in the **SI Editor.**

Save and *exit* to return to the **SI Explorer.**
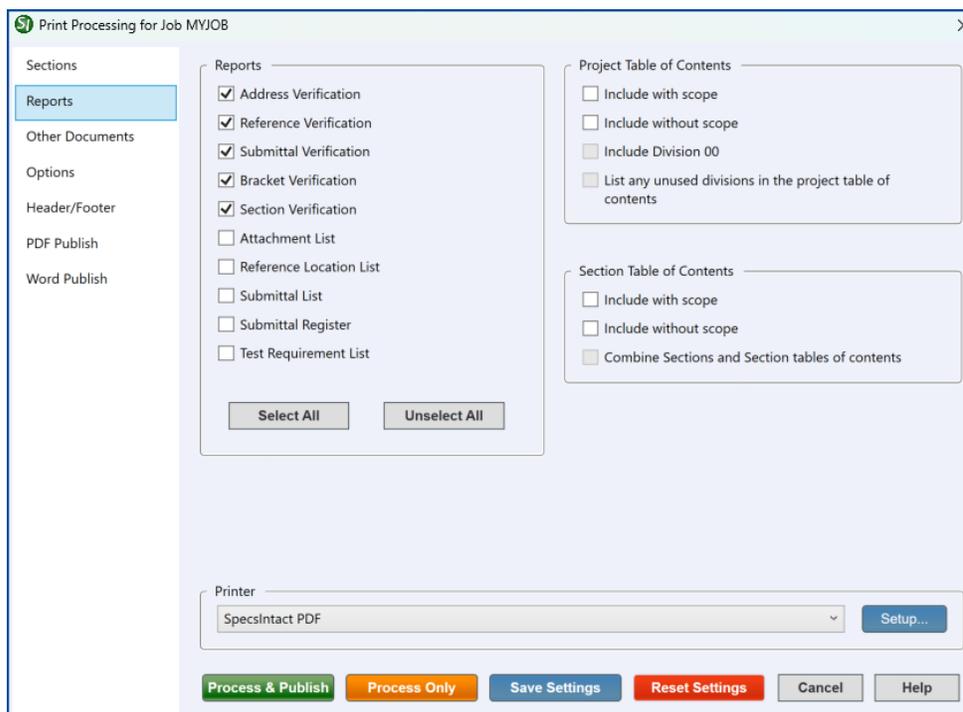
Use the **Print/Publish** option in the **SI Explorer** to *generate* PDF, Word or Print **SpecsIntact** Sections and Verification Reports.

Additional information on all reports can be found under the Print Processing – Reports Tab topic in this guide.

SI Reports

SpecsIntact reports will point out any discrepancies in the References, Submittals, etc. in your Sections.

Run these frequently so you can correct issues as you go.

Finish

Here is a summarized list of the **SpecsIntact** workflow steps outlined above:

1. *Open* the **SI Explorer** to create a new Job.
2. *Click* the **New Job** button on the Toolbar.
3. *Fill in* the **Job name** and **Title** fields as applicable. *Click* **OK**.
4. The **Add Sections** window opens for you to *select* Sections to add to your Job.
5. The **Tailor Sections in Job** window opens.
   a. To remove/hide an option, *uncheck* the box beside it. Once finished, *click* **OK** to apply them, or *click* **Cancel** to skip this for now.
6. Use the **SI Explorer** to *open* a Section for editing in the **SI Editor.**
7. *Edit* all your Sections in the **SI Editor.**
   a. Remember to *save* and *exit* after finishing Section edits to return to the **SI Explorer** to *select* the next Section to edit. *Repeat* with each Section.
8. Use the **Print/Publish** option to *process* and *print* your edited Job Sections.
   a. You can *generate* PDF or Word versions of your Sections or *print* **SpecsIntact** Sections and Job Verification Reports.
9. *Review* Reports and *correct* any errors or discrepancies noted on each report.

For additional guidance, watch the eLearning modules within **Chapter 2 - Creating a Job and Adding Sections**, **Chapter 4 - Process and Print/Publish**, and **Chapter 6 - Correcting QA Report Errors and Discrepancies**.

Job Creation - Additional Details

While the previous topic showed you the quick basics you need to create and then publish your Job, this topic will cover some additional details that will be helpful in the Job creation phase.

Adding Sections to a Job

Once you fill out the required **Job name** and **Title** fields in the **Create New Job** window and click **OK**, the **Add Sections** window opens next (as was shown in the **SpecsIntact Workflow** topic above). However, there is some additional information that is helpful to know about adding Sections to your Job.

ⓘ After your Job has been created, you can click on your Job name and easily add additional Sections by clicking on the **Add Sections** icon at the top of the **SI Explorer** window.

Add Sections Window

From the **Add Sections** window, you have the following source options for adding Sections to your Job:

1. **Masters**: To *add* Sections to your Job from a Master, you must *select* them from the applicable Master in the **Add Sections** window. The default Master is usually the **UFGS Master**, although you may also have a local Master on your system that contains local Sections you may also want to add.

   ⓘ A good way to manage any Sections that you need to create and use in your projects is to maintain them in a local Master. A local Master contains Sections that are specific to a District, Region, or AE Firm that contains unique Sections not found in the **UFGS Master**.

   📽 For additional guidance, watch the eLearning modules within **Chapter 2 – Creating a Job and Adding Sections.**

If you have a local Master available, it should show up in your **Add Sections** window as well as the **UFGS Master**. See example below:
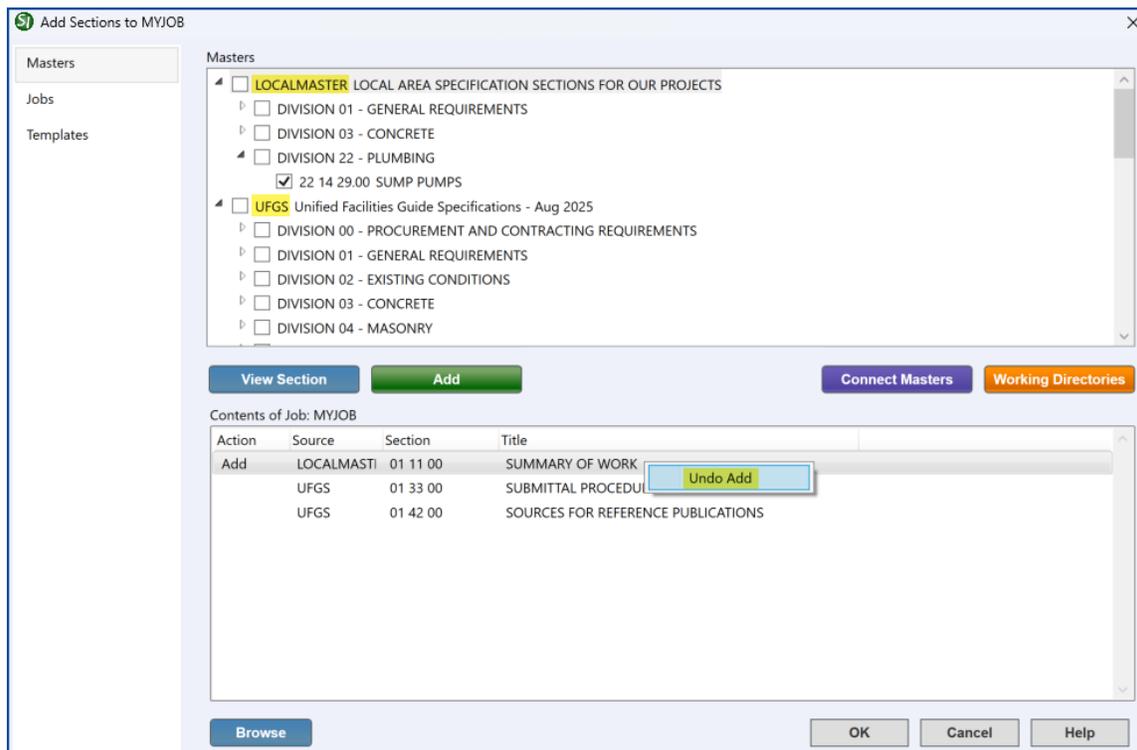
🖐 **Undo Add**: If you inadvertently selected a Section that you did not mean to add, you can *right-click* on it in the **Contents of Job** panel and *select* **Undo Add**. Note that this only works if you haven't yet clicked **OK** to formally add it to your Job.

ℹ️ Remember that as you are checking Sections to be added to your current Job, you must *click* on the green **Add** button which initially adds them to the **Contents of Job** pane in the **Add Sections** window. To add the selected Sections to your Job, you must *click* **OK** at the bottom of the **Add Sections** window.

2. **Jobs**: To *add* Sections from another Job, *select* **Jobs** tab, and all the connected Jobs on your system will appear for you to *select* and *add* Sections from.

3. **Templates**: To *create* a new Section and *add* it to your Job, *select* **Templates** tab. From here, *select* the template source you prefer to use (usually any available UFGS Section template), then *enter* the applicable new Section **Number** and **Title** in the provided fields. Once this information is entered, *click* the green **Add** button to add it to the Sections list in the **Contents of Job** pane. *Click* **OK** to *add* the new template Section to the Job.
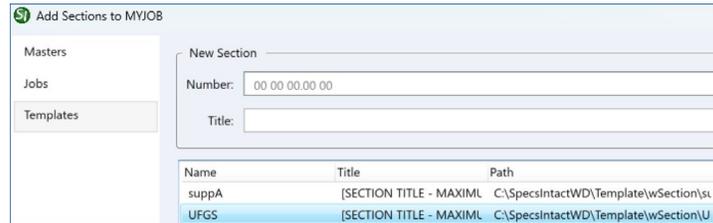
(i) Given the complex tagging structure of **SpecsIntact** Sections, instead of creating a template Section, it may be easier to start with a similar Section from either the **UFGS Master** or your local Master. *Add* this chosen Section to your Job then you can rename it and edit it accordingly.

! You must use the **SpecsIntact Rename** option to rename a Section. For these instructions, refer to the SI Explorer Sections Menu - Rename Help topic.

4. **Browse** button: This button is located at the bottom of the **Add Sections** window. It allows you to browse to any folder in Windows File Explorer to add other Sections into the Job.

Drag and Drop Sections into a Job

Once a Job is created, you can also add Sections to it by dragging and dropping Sections within **SpecsIntact** from one Job or Master to another. Additionally, you can also add Sections to your Job by dragging them from an external source, such as a Windows File Explorer folder, and dropping them into your Job or Master folder.

SpecsIntact will confirm the insertion of a Section from either method with a pop-up message:
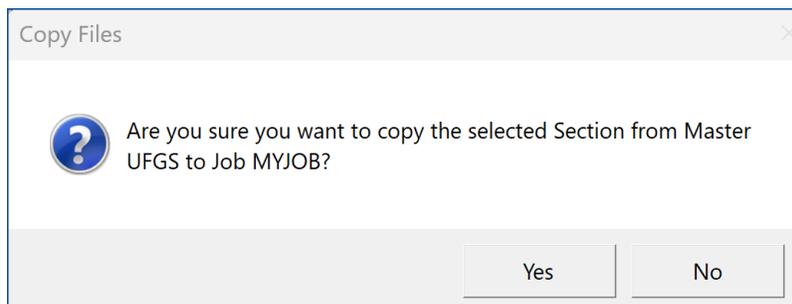
? **Can I add a Section I received in an email to my Job?** While you cannot drag and drop a Section directly from an email, you can save the attachment to your computer and then drag and drop it from the Windows File Explorer folder into your Job as noted above.

For additional guidance, watch the eLearning modules within **Chapter 2 – Creating a Job and Adding Sections**.

Managing Your Job

Once a new Job (project) is created, there are many ways to manage it and keep track of Job specific information. You can set up the contents of some default categories in the **Properties for Job** window and then choose which of those categories you want to display as **Column Headers** in the Jobs **Contents** panel. See an example of these column categories highlighted below.
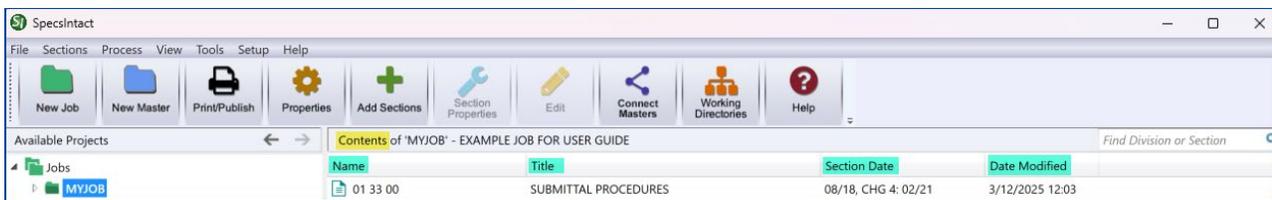
To manage which columns are displayed, right-click on any existing column header and select **Column** option. Available columns for Jobs include the following: **Title, Section Date, Date Modified, Preparing Activity, Specifier, Type, Division, Last Edited By** and **Summary**. All this information is located on the applicable tab in the **Properties for Job** window which is discussed in more detail below.

Properties for Job Window

To access the **Properties for Job** window, *select* the Job name then *click* the **Properties** button. In addition to the **General** tab this window opens to by default, there are five additional tabbed options (categories) available for use in tracking everything to do with this Job: **Specifiers, Options, Schedule, Cover Page** and **Comments**.

1. **General**: The **General** tab contains important information about the Job. The only required fields in this window are the **Job name** and **Title**.

💡 All the text entry fields on the **General** tab are available as Header and Footer variable options in the **Header/Footer** tab of the **Print Processing** window for the Job (e.g., **Job name, Title, Contract number, Location, Lead specifier** and **Source**). This means any content entered in these fields can be automatically selected to be inserted in the Header or Footer of the printed or published specification Sections.

ⓘ Additional information about the header and footer variables on the **Properties for Job** window can be found under the topic in this guide.

2. **Specifiers**: The **Specifiers** tab is used to assign Specifiers to the Divisions they are responsible for editing at the Job level. All Sections added to the Job are then automatically assigned the appropriate Designer for that Division. NOTE: No fields are required on this tab.

3. **Options**: The **Options** tab is used to set up some Job specific options that will determine how your Job is viewed and processed. For instance, will English or Metric units be used, will you be using Revisions (tracking changes) and what **Paragraph Format** (**Numeric** or **Alphanumeric**) will be used for the project?

   💡 By default, **English** and **Use Revisions** are selected. Also, MasterFormat 2010 is the latest version, and the **Paragraph Format** is set to **Numeric** as all government Jobs use the **Numeric** numbering scheme.

4. **Schedule**: The **Schedule** tab was designed to track the progression and timeline of your Job by capturing the **Review Status /Amendment Level** and due dates. In addition, it provides a

spreadsheet like format to track the **Job Cycle** which includes columns for the **Operator**, **Percent** level, **Date Received/Due/Delivered**, as well as **Hours** spent. If maintained properly, this information can be used to provide updates during scheduled project status meetings. NOTE: No fields are required on this tab.

💡 The **Review Status / Amendment Level** you create or choose in the **Schedule** tab can also be selected in the **PDF Publish** tab of the **Print Processing** window. This allows you to save copies of the Job PDF files in their own subfolder per Amendment/Submittal phase.

5. **Cover Page**: On the **Cover Page** tab, you can add a cover page to a Job either by creating a new cover page or by adding one provided by a government agency. You can select an existing cover page from the drop-down list. If no cover pages already exist, the only option is **No Cover Page**. There are also options to browse to an existing cover page or create a new cover page. NOTE: No fields are required on this tab.

6. **Comments**: The **Comments** tab provides an area to record your notations about the Job. Entries are user-specific, and date-time stamped, with each new entry appearing at the top of the text box (e.g., 'J. Doe: 6/19/2025 3:06 PM - Updated Section 06 61 16 with redlined changes for 35% Submittal.'). NOTE: No fields are required on this tab.

ℹ️ Some of the **Print Processing** information noted above in the **General** and **Schedule** tabs will be revisited in more detail later in this **User Guide**.

Using Tailoring Options to Pre-Edit a Job

Previously it was recommended that as soon as you create a new Job you should export the Tailoring Options for the whole Job and have the specifier mark it up to indicate which Tailoring Options will not be needed for the project. You can use that information to pre-edit the Job at the beginning.

ℹ️ Additional information on Tailoring Options can be found under the Pre-Printing, Markup and Editing Considerations and Questions topic in this guide.

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 **UFGS Master** specification writers. Tailoring Options can be agency specific as well as product or method specific, allowing a project specifier to turn off/pre-edit the options they don't want to include in their project before they even begin to mark up the Section(s). These can be applied throughout the entire Job, or in selected

Sections, without opening any of the Sections in the **SI Editor**. This eliminates the need to manually edit this information out of each Section.

Tailoring is displayed by default after you finish adding all the Sections in the **Add Sections** window when creating a new Job or Master. For instance, when processing an Army project, all **NAVFAC**, **NAVY** and/or **AIR FORCE** related Tailoring Options can be removed from the project before the first Section is even marked up. In this scenario, the following **NAVFAC** and **NAVY** specific Tailoring Options would be removed during the pre-editing/tailoring of all the Job Sections for the current project. See the example below of just one Section that contains multiple Tailoring Options for both **ARMY** and **NAVY**. Unchecking the Tailoring Options the project specifier does not want to include removes any text that is contained within those applicable Tailoring (TAI) tags in the selected Section of the Job.

You can tailor an individual Section by right-clicking on it from the Job or Master **Contents** pane and selecting the **Tailor** menu option.
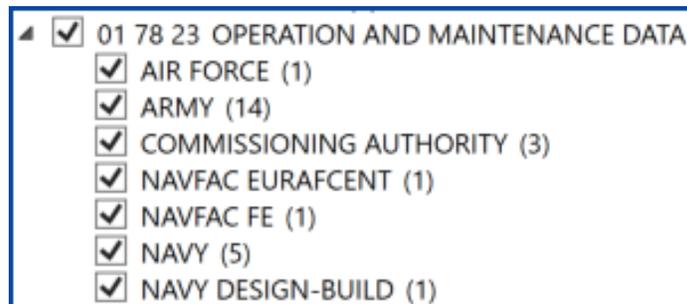
NOTE: The number in the parenthesis beside each Tailoring Option indicates how many times that particular Tailoring Option appears in the Section. From here, you can globally choose to keep or remove a particular Tailoring Option from the entire Section.

To access the complete list of Tailoring Options for an entire Job, right-click on the Job name and select the **Tailor Job** option as shown below:

Add Sections...
Delete Job SI-TRAININGJOB...
Duplicate Job SI-TRAININGJOB...
Rename Job SI-TRAININGJOB...
Backup and Restore...
Go Back
Go Forward
Tailor Job SI-TRAININGJOB...
Export Tailoring for Job SI-TRAININGJOB...
Export Submittal Register for Job SI-TRAINING_JOB
Search and Replace SI-TRAININGJOB...
Export Search Results...
Find Jobs...
Execute Revisions...
Remove Change/Highlight Tags...
Release Processing...
Specify PDF Folder...
Specify Word Folder...
Delete PDF Subfolders...
Jobs Icon Color
Process and Print/Publish...
Properties...
Open in Windows Explorer

All Tailoring Options in the Job are listed in this window. From here, you can globally choose to keep or remove the available Tailoring Options for the entire project. To remove/hide an option, uncheck the box beside it.

Tailor Sections in Job: SI-TRAINING_JOB

To remove tailored data from within a Section, clear the mark next to the Tailor Option. Clearing at the Section level will clear all the options for that Section.

To make the same Tailoring Option selections in all Sections, check the option 'Automatically apply check/uncheck to identical Tailoring Options in other Sections' BEFORE selecting or deselecting any Tailoring Options.

Of the 9 Sections selected. 8 Sections with Tailoring Options are listed.

Tailor Options

☑ Use Revisions
☑ Automatically apply check/uncheck to identical Tailoring Options in all Sections [applies only to selections made after it is checked]

- ☑ 01 33 00 SUBMITTAL PROCEDURES
  - ☐ AIR FORCE (1)
  - ☑ ARMY (19)
  - ☑ ARMY DESIGN-BID-BUILD (2)
  - ☑ ARMY DESIGN-BUILD (14)
  - ☑ DESIGN-BID-BUILD (2)
  - ☑ ELECTRONIC SUBMITTAL (2)
  - ☑ HARD COPY SUBMITTAL (9)
  - ☐ NAVY (16)
  - ☑ SUSTAINABILITY (2)
- ☑ 01 78 00 CLOSEOUT SUBMITTALS
  - ☐ AIR FORCE (1)
  - ☑ ARMY (38)
  - ☑ AUTOCAD (4)
  - ☑ GT$5MIL (3)
  - ☑ LT$5MIL (3)
  - ☑ MICROSTATION (5)
  - ☐ NAVFAC NW (7)
  - ☐ NAVY (11)
  - ☑ NAVY DESIGN-BUILD (1)
- ☑ 01 78 23 OPERATION AND MAINTENANCE DATA
  - ☐ AIR FORCE (1)
  - ☑ ARMY (13)
  - ☑ COMMISSIONING AUTHORITY (3)
  - ☑ NAVFAC EURAFCENT (1)
  - ☐ NAVFAC FE (1)
  - ☐ NAVY (5)
  - ☑ NAVY DESIGN-BUILD (1)
- ☑ 03 30 00 CAST-IN-PLACE CONCRETE
  - ☐ AIR FORCE (1)
  - ☑ ARMY (18)
  - ☐ NAVY (1)
- ☑ 06 10 00 ROUGH CARPENTRY
  - ☐ AIR FORCE (1)
  - ☑ ARMY (10)
  - ☐ NAVY (20)
- ☑ 06 20 00 FINISH CARPENTRY
  - ☐ AIR FORCE (1)
  - ☑ ARMY (12)
  - ☐ NAVY (1)
- ☑ 06 61 16 SOLID SURFACING FABRICATIONS

[Mark All] [Clear All] [Print] [Export]

Parentheses indicate number of occurrences of Tailoring Option in Section.

[OK] [Cancel] [Help]

❗ Unchecking a Tailoring Option under any Section here also unchecks it from every Section in the Job (e.g., when **AIR FORCE** was unchecked in Section 01 33 00, it was also automatically

unchecked in every other Section in the Job). This ensures that the pre-editing of these options is applied everywhere those options exist throughout every Section in the Job.

SpecsIntact Section Essentials

Knowing the basic structure of a **SpecsIntact** Section is <u>key</u> to the basics of properly editing and/or reviewing a Section for accuracy. 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. This begins with understanding **SpecsIntact** tags: what they are, how they are used to format Sections, and how they identify components within a Section.

❗ Some of the biggest and most time-consuming 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.

Importance of Starting with Latest UFGS Sections

Use the latest **UFGS Master** Sections, as they contain the most current information for your project.

The **UFGS Master** database is updated and released quarterly in February, May, August and November each year. By default, when you open **SpecsIntact**, the system checks for updates to the **UFGS Master** and prompts you to download the newest **UFGS Master** if one is detected.

This chapter will focus on important things to be aware of when editing a Section for use in **SpecsIntact** projects. When a **UFGS** Section is added to a Job (project) from the **UFGS Master**, it has all the necessary components (PARTS, Subparts, etc.), is already formatted properly, and contains all the necessary system tags. Understanding this is key to producing the most complete and accurate Section content.

Section Structure

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 and understand how a Section is structured.

Section System Identifier and Date Tags

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.

```
<SEC><MTA NAME=SUBFORMAT CONTENT=NEW/><MTA NAME=AUTONUMBER CONTENT=TRUE/>
                  <SCN>SECTION 03 30 00</SCN>

          <STL>CAST-IN-PLACE CONCRETE</STL>
          <DTE>02/19, CHG 9: 08/24</DTE>
```

Parts and Subparts

Formatting is everything to making a specification Section easier to read. **SpecsIntact** offers many options to make this easy if you know which tags to use.

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.

Think of Section structure like a numbered outline. Each Section has three major top levels called Parts. All numbered paragraphs within each part are called Articles and Subparts. As you add or delete these while editing, the **SpecsIntact Editor** renumbers the Articles and Subparts accordingly, provided they are tagged correctly.

ⓘ Parts are not automatically renumbered as all three Parts are required in every Section – **no more/no less**! The only exception to this rule is Section documents in the **UFGS Master** Division 00 - PROCUREMENT AND CONTRACTING REQUIREMENTS.

The titles of the three standard Parts cannot be changed, and the titles should be exactly as shown below in <u>ALL CAPS</u> with <u>three spaces</u> between the PART number and the TITLE.

PART 1   GENERAL (Contains the '1.x REFERENCES' and '1.x SUBMITTALS' Article's)
PART 2   PRODUCTS
PART 3   EXECUTION

Each Part contains a specific type of information:

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

    ℹ️ There are two specific Articles that if they are included in a Section, must reside in PART 1 GENERAL. These are the '1.x REFERENCES' and '1.x SUBMITTALS' Article's. Additionally, if they are both included, the Reference Article always appears above the Submittals Article. This specific placement is imperative to both Reference and Submittal processing and Verification Reports.

2. **PART 2 PR0DUCTS** describes the quality of items required for the Job.

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

If a particular Part does not apply to a Section and contains no information, it should <u>NOT</u> be deleted, it should simply be noted within text tags as not used. See the example below:

Shown with tags ON	With tags OFF

`</SPT =1.4></PRT =1><PRT =2><TTL>PART 2    PRODUCTS</TTL>`
 	
`<TXT>Not used.</TXT>`
 	
`</PRT =2><PRT =3><TTL>PART 3    EXECUTION</TTL>`
	PART 2 PRODUCTS
	
	Not used.
	
	PART 3 EXECUTION

Notice in the example above the proper insertion of the PRT tags.

In the graphical picture of a typical Section structure below, notice that Parts have their own beginning and ending PRT tags. However, Articles and Subparts (Paragraphs and Subparagraphs) all share the same beginning and ending Subpart (SPT) tags. You can tell what level a Subpart tag represents 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.

```
<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)
```

Inside a Subpart: Articles, Paragraphs and Subparagraphs

Subparts are used within each of the three Parts to create sub-level paragraphs. Proper paragraph tagging and the effective use of these Subparts (including multiple levels within them) are essential for ensuring a specification Section is organized and easy to read.

The first Subpart level under a Part is known as an Article. The second and third level Subparts are Paragraphs and Subparagraphs, respectively. The actual paragraph text within these use TXT, LST and ITM tags, which provide three levels of normal paragraph (un-numbered) indentions.

The **SI Editor** will allow you to insert almost unlimited Subpart paragraph sublevels. However, refer to the part and Subpart numbering information in the UFS 1-300-02 which currently advises using only six levels (seven if you count the Part as a level). Additionally, each Subpart is required to have a Title. The screenshot example below is taken from the **SI Editor Navigator**. Look at Subpart 3.2 HARBOR WATERWAYS through 3.2.1.1.1.1 Annual Pearl Harbor "Hydrofest" for a visual picture of this.

```
PART 3   EXECUTION
    3.1       HAZARDS TO [AIRFIELD][HELIPORT] OPERATION
    3.2       HARBOR WATERWAYS
        3.2.1       Hazards to Navigation
            3.2.1.1       Submarine Cables or Underwater Utilities
                3.2.1.1.1       RIMPAC Operational Exercises
                    3.2.1.1.1.1       December 7, 1941 Commemorative Ceremonies
                        3.2.1.1.1.1.1       Annual Pearl Harbor "Hydrofest"
    3.3       MODEL UNIT
```
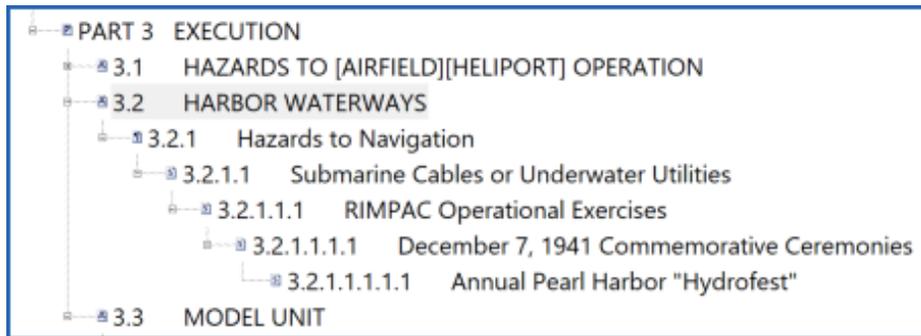
Insert Subpart Template and Title Capitalization Rules

Subpart title capitalization rules depend on what level the Subpart is:

a. **Top-Level Subpart Titles** (Articles): should always be in ALL CAPS like Part Titles.
b. **Sub-level Subpart Titles** (Paragraphs and Subparagraphs): should always be in Title Case.

💡 If you use the **Subpart** ⬚SPT button, a Subpart template is inserted that contains all the components of a Subpart:

- Subpart (<SPT =1.5> </SPT>) tags.
- The applicable Subpart number (e.g., 1.5).
- TTL tags with fill-in brackets that guide you with the correct title case displayed.
- TXT tags with fill-in brackets to guide you as to where to insert the Subpart paragraph text.

Text Paragraphs – Indent Levels/Tags

Within each Subpart, regular text paragraphs have three paragraph indentation tag options: TXT, LST, and ITM. All three of these, by default, are used for normal, left-justified paragraphs, just with a slight tabbed indent depending on which one you choose. Please note that while each paragraph itself uses single lines, standard format directs you to insert a blank line in between each paragraph.

With tags ON:	With tags OFF:
<TXT>Regular paragraph TEXT TAGS.**</TXT>**	Regular paragraph TEXT TAGS.
<LST>Indented paragraph – first level – left justified.**</LST>**	Indented paragraph – first level – left justified.
<ITM>Indented paragraph – second level – left justified.**</ITM>**	Indented paragraph – second level – left justified.

Both the LST and ITM tags above have additional indent options for manually entered lettered and numbered lists. To access this, simply click the **Toggle Indentation** button on the **SI Editor Toolbar** when your cursor is within a set of LST or ITM tags. The indention option was previously used for manually inserting lettered and/or numbered items with a left-blocked format, as shown below. However, these lists are not capable of auto re-numbering and are also limited to just one automatic indent level (-0.33).

See examples with tags ON and OFF below:

With tags ON:

With tags OFF:

```
a.  First level with LST tags has a -0.33 indent.  Notice that the second
    line of text ends up even with the first word in the sentence when View
    Tags is turned OFF.

    (1) Second level with ITM tags also has a -0.33 indent.  Notice that
        the second line of text ends up even with the first word in the
        sentence when View Tags is turned OFF.
```

The approved/standard indented list lettering and numbering options are as shown below. Note that these are also required to be double-spaced:

```
a.  Lowercase letters and a period

    (1) Numbers in Parenthesis

        (a)  Lowercase letters in parenthesis

            1. Numbers with periods
```

SpecsIntact's new **Ordered List** function offers automatic numbering and is now the preferred method of inserting lists.

Additional information can be found on ordered lists under the Ordered Group & List Paragraph Tags with Automatic Numbering topic in this guide.

For additional guidance, watch the **SI Editor and Section Structure Overview** eLearning module within **Chapter 3 – Editing**.

Ordered Group & List Paragraph Tags with Automatic Numbering

The **SI Editor's** new **Ordered List** function with the auto renumbering feature makes the previously noted ITM and LST tags and indention options obsolete, although they are still accessible and able to be used.

To insert a new Ordered List, perform the following steps:

1. *Place* your cursor on the blank line where you want to begin the list and *click* the **Ordered List** button. This inserts a set of Ordered List (OLI) tags inside Ordered Group (OLG) tags. This completes the first lettered list item template text.

💡 If you use the **Ordered List** [a.─ (1)─] button, the Ordered List template is inserted and contains all the needed tagging components, as well as a bracketed option for you to enter the applicable item text.

```
<OLG>
    <OLI ITEM=a.>a.  [Item]</OLI>
</OLG>
```

2. To add additional list items on the same level, *press* the **Enter** key once, then *click* the **Ordered List** [a.─ (1)─] button again for each additional item you want to add. If you want sub-levels of the first level, just *press* the **Tab** key on your keyboard while your cursor is inside the OLI tags of that item – up to the four approved levels shown below. You should not go out more than those four standard/approved levels.

<u>**With tags ON:**</u>

```
<OLG>
  <OLI ITEM=a.>a.  [Item]</OLI>

        <OLI ITEM=a.(1) LEVEL=2>(1)  [Item]</OLI>

              <OLI ITEM=a.(1)(a) LEVEL=3>(a)   [Item]</OLI>

                    <OLI ITEM=a.(1)(a)1. LEVEL=4>1.  [Item]</OLI>
</OLG>
```

<u>**With tags OFF:**</u>

```
a.  [Item]

      (1)  [Item]

            (a)  [Item]

                  1.  [Item]
```

Notice the ordered list letters and numbers are recorded in the applicable beginning OLI tag as an attribute of that tag. This is how **SpecsIntact** keeps track of what level the items are so it can perform its auto-numbering. Also note, what level gets inserted depends on where your cursor is when you click the **Ordered List** [a.─ (1)─] button.

💡 To learn more about **SpecsIntact** ordered lists, refer to the <u>Ordered List</u> topic in the Web-Based Help.

SpecsIntact Tagging

It is very important to pay attention to the accuracy of tag placement and spacing when entering new text into a Job Section. The following topics will detail correct editing practices as it pertains to the above goal. Incorrect tagging of added text may result in errors and erroneous information on **SpecsIntact** verification reports. Likewise, incorrect deletion of text can also cause similar issues.

Every piece of text within a **SpecsIntact** Section needs to be enclosed by its applicable beginning and ending tags. This applies from the Section (<SEC>Section</SEC>) tags that define the entire Section, down to the Part (PRT) and Subpart (SPT) tags, and all other tags identifying additional components within the paragraphs of those Parts and Subparts.

Additionally, it's important to realize that each **SpecsIntact** tag has its own default font settings. For instance, tags associated with a note (NTE & NPR) have a **Bold** text font applied to them, and other tags, such as those associated with Reference (RID) and Submittal (SUB) tags are color-coded to make them stand out. These fonts should <u>NOT</u> be altered to maintain consistency throughout the projects they are used in.

To learn more about **SpecsIntact** tags, refer to the SpecsIntact Tags topic in the Web-Based Help. This help topic lists and defines each **SpecsIntact** tag.

The Keys to SpecsIntact - Tag Relationships

As stated previously, you cannot successfully use **SpecsIntact** without understanding and using the tags correctly. 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, Hypertext Markup Language (HTML), 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 of a Section.

It is possible to view a Section on your screen without viewing the tags, but when editing, you should <u>always</u> have the tags visible to avoid big problems. This is discussed in more detail later in this **User Guide**. 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 vital that your tagging is correct so that all the elements within your Sections are identified properly.

ℹ️ Most tags come in pairs: the beginning and ending tags encompass the text information they define. Notice that the end tag is distinguished by a forward slash / within the tag (e.g., _{Text}).

While the tags 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>, <granddaughter> and so on. This is much like the tagged elements in your specifications. A measurement for English (ENG) units, for instance, may also be within tags for text, Subpart, Subparagraph, Paragraph, Article, Part, a Reference or Submittal and ultimately, the parent tag: Section.

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

Tag Rules

Every set of tags either completely encompasses another set, or the set is completely contained within another set of tags. Tags should never be interlinked. See the graphic examples below:
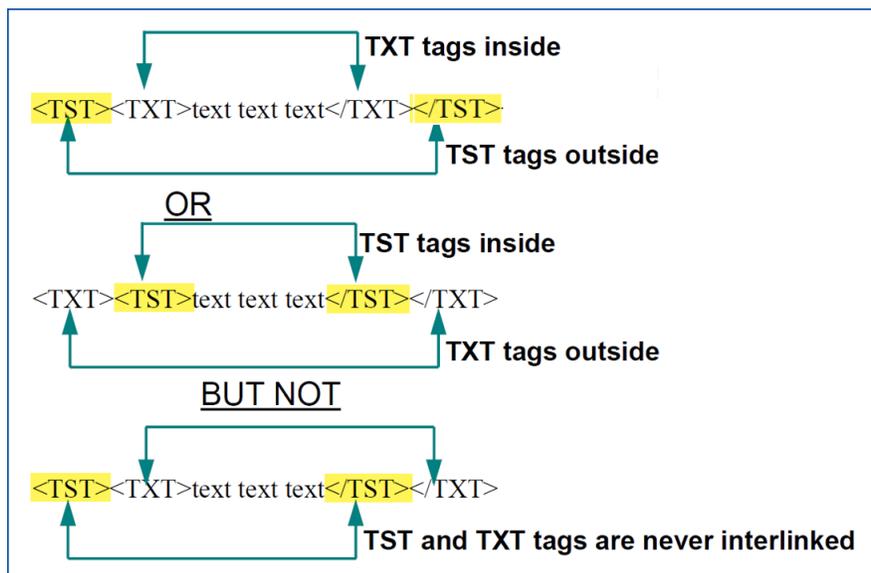
❗ Tags are not typed, they are inserted using either the corresponding button on the **Tagsbar** of the **SI Editor**, or by using the **Insert** menu > **Tags** option which allows you to choose the tag you want to insert from the drop-down box. Inserting tags using these methods ensures that they are placed correctly and that both beginning and ending tags are used.

Important Notes and Additional Tagging Rules:

1. <u>ALL</u> content in a Section must be tagged.
2. Every Section must begin with a <SEC> tag and end with a </SEC> tag.
3. The <SEC> tag is followed by a meta tag line: <MTA NAME=SUBFORMAT CONTENT=NEW/>.
4. All three Parts must begin with a <PRT =#> tag and end with a </PRT =#> tag.
5. Every Article must begin with a <SPT =#.#> tag and end with a </SPT =#.#> tag.
6. Every Paragraph must begin with a <SPT =#.#.#> tag and end with a </SPT =#.#.#> tag.
7. Every Subparagraph must begin with a <SPT =#.#.#.#> tag and end with a </SPT =#.#.#.#> tag.

Entity Tags

There are only four **SpecsIntact** Entity tags. These Entity tags do not have a beginning and ending tag like all other **SpecsIntact** tags. They are single tags that when you have **View Tags** toggled ON you see the tags, when your **View Tags** option is toggled OFF you see the text that the Entity tag represents. See the examples below:

a. **<AST/>** - Asterisk line. When tags are OFF, this tag displays as a line of asterisks. It is only inserted before and after specifier notes and displays as:
****

b. **<EOD/>** - End of Document. Inserted at the end of all **SpecsIntact** documents (not Sections). When tags are OFF, this tag displays as:
-- End of Document --

c. **<END/>** - End of Section. Inserted at the end of all **SpecsIntact** Sections (.sec files). When tags are OFF, this tag displays as:
-- End of Section --

d. **<NED/>** - Need tag. Inserted near the end of all **SpecsIntact** Sections (.sec files). When tags are OFF, this does not display at all. This entity tag is used to identify additional text that is needed to print on the last page of the Section file. For example, so -- End of Section -- or -- End of Document -- does not print on the page by itself. Essentially, this is a smart page break.

Tailoring Option Tags

Text that is considered a Tailoring Option is surrounded by Tailoring (TAI) tags. Text within tailoring tags defaults to the same teal color of the tag, so even with tags off it is easily recognized as tailored text. These tailoring tags are then further defined by an added attribute to identify what specific Tailoring Option should be used on a particular term, sentence, or piece of text. Text tagged as a Tailoring Option can be turned off or removed to exclude various requirements or agency-specific information that does not apply to the current project.

See a perfect example of different Tailored Options that appear in almost every **UFGS Master** specification Section in the Submittal Article's first text paragraph:

```
</SPT =1.2.3></SPT =1.2><SPT =1.3>1.3    <TTL>SUBMITTALS</TTL>

<TXT>Government approval is required for submittals with a "G" or "S"
classification.<TAI OPT=AIR FORCE,NAVY>  Submittals not having a "G" or "S" classification are for
Contractor Quality Control approval.</TAI><TAI OPT=ARMY>  Submittals not having a "G" or "S"
classification are for information only.  When used, a code following the
"G" classification identifies the office that will review the submittal for
the Government.</TAI>   Submit the following in accordance with Section <SRF>01 33 00</SRF>
SUBMITTAL PROCEDURES:</TXT>
```

As you can see above in the first tailored sentence, you can also have multiple tailoring attributes that apply to the same text. In this example both **AIR FORCE** and **NAVY** agree on and therefore prefer to use the same sentence here. **ARMY**, on the other hand, requires a completely different sentence to be followed for guidance here.

> **!** In the first instance where the Tailoring attributes are both **AIR FORCE** and **NAVY**, the specifier would have to choose to deselect (turn OFF/hide) both of those specific Tailoring Options for that sentence to get hidden/removed. If only **NAVY** is turned OFF, and not **AIR FORCE**, this text would remain in the Section and vice versa. Only by deselecting both **AIR FORCE** and **NAVY** would the sentence get automatically hidden.

Tags and References

SpecsIntact helps automate the use of References in your Job. This great time saver is controlled using 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 used within your Job, a task **SpecsIntact** will accomplish for you during the Reference Reconciliation process at time of print. Of course, it is dependent on any added information being inserted and tagged properly.

ℹ️ Additional information on References can be found under the [Reference Reconciliation and Verification Report](#) and [SI Editor's Reference Tool and Wizard](#) topics in this guide.

Section 01 42 00 (Address Section)

The content of the References cited in the individual **UFGS Master** Sections is considered part of the specifications. **UFGS** Section 01 42 00 'Sources for Reference Publications' serves as a comprehensive directory, providing addresses and contact information for every Reference Organization cited within the **UFGS Master**. For example:

> FEDERAL EMERGENCY MANAGEMENT AGENCY (FEMA)
> 615 Chestnut Street
> One Independence Mall, Sixth Floor
> Philadelphia, PA 19106-4404
> Ph: 215-931-5597
> E-mail: femar3newsdesk@fema.dhs.gov
> Internet: https://www.fema.gov/

As mentioned earlier, this Section is required in all projects and is automatically added when you create a new Job. During processing, the Reference Address list contained in Section 01 42 00 will be used to check the Reference Publications in each project Section for validity.

💡 Since **UFGS** Section 01 42 00 only contains Reference Organizations and their address information, and all related processes and reports have 'Address' in their name, we often refer to this Section as the 'Address' Section.

The 01 42 00 Sources for Reference Publications Section contains tagged information for every single Reference found in the entire **UFGS Master** database:

1. Reference (REF) tags surround all the applicable Reference information as well as their tags for each reference publication listed. These tags and details are listed below:

   a. Organization (ORG) tags enclose the name of the sponsoring organization.

   b. Organization Address (OAD) tags surround the address, phone, fax, email and Internet information for each sponsoring organization.

   Example:

```
<REF><ORG>AMERICAN ARCHITECTURAL MANUFACTURERS ASSOCIATION (AAMA)</ORG>
        <OAD>1900 E Golf Rd, Suite 1250
        Schaumburg, IL  60173
        Ph:   847-303-5664
        E-mail: customerservice@FGIAonline.org
        Internet:  <URL HREF=https://fgiaonline.org>https://fgiaonline.org/</URL></OAD>

</REF>
```

Additional information on Reference addresses can be found under the Address Reconciliation and Verification Report topic in this guide.

Reference Identifier (RID) Tags and Structure Within Other Sections

Within each **UFGS Master** Section, a listing of References used in that Section is contained in PART 1 GENERAL within the Reference Article. Each Reference is surrounded by Reference Identifier (RID) tags, and just as with Tailoring Options, the reference information inside the RID tags takes on the pink color of the RID tags so that even with tags turned OFF you can tell at a glance that you are looking at a Reference Identifier.

It is important to note that you can add References to this list under the appropriate Reference Organization, but you should **NEVER** remove any References from this Article, as any you do not use in the edited Section text will be automatically excluded from the output files you produce during Reference Reconciliation processing.

1. The Reference Article for each Section contains the following information:

   a. Reference (REF) and Reference Organization (ORG) tagged information is listed here for the applicable organization. NOTE: The Reference Organization Address (OAD) information is not listed or needed here, it is only included in the 01 42 00 Section.

   b. All Reference Identifiers (RID) used throughout the current Section are listed here under their respective Reference Organization along with their applicable Reference Titles (RTL).

   c. Reference Titles (RTL) that correspond to the specific Reference Identifier (RID) are listed after each individual RID.

   Example below:

```
<REF><ORG>AMERICAN WELDING SOCIETY (AWS)</ORG>

<RID>AWS D1.4/D1.4M</RID>          <RTL>(2018) Structural Welding Code -
                                   Reinforcing Steel</RTL>


</REF>.
```

ⓘ   Outside the Reference Article, you will **only** have context specific Reference Identifiers such as <RID>AWS D1.4/D1.4M</RID> shown below:

```
</SPT =1.8.2></SPT =1.8><SPT =1.9>1.9   <TTL>QUALIFICATIONS FOR WELDING WORK</TTL>

  <TXT>Welding procedures must be in accordance with <RID>AWS D1.4/D1.4M</RID>.</TXT>

</SPT =1.9></PRT =1><PRT =2><TTL>PART 2   PRODUCTS</TTL>
```

❗ If a Reference Standard is called out in the body of the Section anywhere, it must be tagged as a Reference (RID) by inserting the applicable Reference Identifier (<RID>AWS D1.4/D1.4M</RID>) tags around it in the text of the Subpart. You must also make sure it is listed in the Reference Article under the applicable Reference Organization (ORG), along with the latest date and title for that Reference Standard.

ⓘ Additional information on References can be found under the Reference Reconciliation and Verification Report and SI Editor's Reference Tool and Wizard topics in this guide.

🎞 For additional guidance, watch the **References** eLearning modules within **Chapter 3 – Editing.**

Tags and Submittals

Submittals are items, such as samples or drawings, that must be provided by the contractor. The **Submittal Register** (discussed in more detail later in this **User Guide**) can be generated from your Job to show all the Submittals in the entire project in a grid format.

Section 01 33 00 Submittal Procedures

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

(11) assigned Submittal Descriptions, containing numbers and names, that should not be altered. These are listed below:

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

1. The '01 33 00 Submittals Procedures' Section contains the following tagged information:

   a. Submittal (SBM) tags are found <u>only</u> in this 01 33 00 Section and surround the information and tags for each Submittal Description and Submittal Definition.

   b. Submittal Descriptions (SD Numbers and Titles) are surrounded by SUB tags, which are within a set of TXT tags.

   c. Submittal Definitions are surrounded by List (LST) tags.

   Example:

   ```
   <SBM><TXT><SUB>SD-02 Shop Drawings</SUB></TXT>

         <LST>Drawings, diagrams and schedules specifically prepared to illustrate
         some portion of the work.</LST>

   </SBM>
   ```

   Additional information on Submittals can be found under the Submittal Reconciliation and Verification Report topic in this guide.

Submittal Identifier Tags and Structure within Other Sections

Within all other **UFGS Master** Sections, Submittal Items are each listed under their corresponding Submittals Descriptions contained under PART 1 GENERAL in the '1.x SUBMITTALS' Article. Only Submittal Items 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.

```
<SPT =1.3>1.3    <TTL>SUBMITTALS</TTL>
```

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

        <ITM><SUB>Formwork</SUB></ITM>
```

ⓘ Outside the Submittal Article, you will **only** have corresponding Submittal Items surrounded by SUB tags, such as 'Formwork' in the example shown above and below. It is not necessary to include the applicable Submittal Description (e.g., SD-02 Shop Drawings) in the text of the Section.

```
<SPT =1.6.2.1>1.6.2.1    <TTL><SUB>Formwork</SUB></TTL>

  <TXT>Drawings showing details of formwork including, but not limited to; joints,
  supports, studding and shoring, and sequence of form and shoring removal.
  Reproductions of contract drawings are unacceptable.  Submit <SUB>form removal
  schedule</SUB> indicating element and minimum length of time for form removal.</TXT>

</SPT =1.6.2.1>
```

ⓘ In addition to the information contained in each Section of a Job, another system generated report called the **Submittal Register** can be produced when printing a Job, provided that the Submittals have been correctly tagged wherever they appear. It lists the materials, products or items for each Submittal, and cites the Section and Subpart or Article number where the Submittal is mentioned in the Job's text. NOTE: Most projects require the **Submittal Register**.

ⓘ Additional information on Submittals can be found under the Submittal Register and SI Editor's Submittal Tool and Wizard topics in this guide.

🎞 For additional guidance, watch the **Submittals** eLearning modules within **Chapter 3 – Editing**.

Tags and Section References

Within almost every **UFGS Master** Section, there are multiple places where the current Section refers to another **UFGS Master** Section that contains related information in addition to the current Section. These are called Section References, and of course, **SpecsIntact** has a tag for that: SRF. Every place in a **UFGS Master** Section that refers to another Section has Section Reference (SRF) tags inserted around just the Section Number. When inserting a new Section Reference into a project Section, note that it

should be inserted EXACTLY as shown in the example below. The Section Number should be immediately followed by the Section Title in ALL CAPS:

SECTION <SRF>01 33 00</SRF> SUBMITTAL PROCEDURES

This is the only way that **SpecsIntact** can ensure that every Section Reference has a valid **UFGS Master** Section that matches the Reference. Any discrepancies will be listed on the **Section Verification Report**, providing the Section References are keyed in correctly and accurately tagged. This report will be discussed in more detail later in the training.

Additional Tags

Listed below are some additional tags that are easily available on the **SI Editor** Tagsbar:

1. Highlight **<HLS>** - when HLS tags are inserted around text, the text turns orange to stand out. This tag is often used to call the Project Manager or specifier's attention to text as the specifications are being prepared.

   The HLS tags have no effect on the final, processed Sections. Additionally, you can easily remove these from all Sections in your Job by *right-clicking* on the Job name and *selecting* the **Remove Change/Highlight Tags** option.

2. Bold **<BLD>** - insert around text to be bolded.
3. Italics **<ITA>** - insert around text to be italicized.
4. Underline **<UND>** - insert around text to be underlined.
5. Center **<CTR>** - insert around text to be centered.

For a complete list of **SpecsIntact** tags, refer to the SpecsIntact Tags topic in the Web-Based Help. This help topic lists and defines each **SpecsIntact** tag.

Units of Measure Tags and Use of Symbols

As previously noted, you can choose to use either English or Metric units of measure in your project. These measurements are identified in UFGS Sections by the applicable tags that surround each unit of

measure. The tags and text are blue or red depending on whether the unit is an English or Metric measurement, making units of measure easily recognizable with or without tags turned on:

1. English <ENG> (e.g., <ENG>5 inches</ENG>)
2. Metric <MET> (e.g., <MET>12.7 centimeters</MET>)

Standard format requires you to spell out the units of measure and to not use symbols only in certain cases. Some examples are noted below:

- Spell out feet when no inches are used. (e.g., 8 feet)
- Spell out inches when no feet are used. (e.g., 8 inches)
- When using both feet and inches, it is permissible to use symbols. (e.g., 8'-8", 8'-2-1/2")
- 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. (e.g., three 1/2-inch holes)
- Always use figures for degrees, percent, and money (e.g., 50 degrees F (20 degrees C), 20 percent, $5.50).
- Decimals should be expressed in figures. (e.g., 6.235)

Symbols Not Allowed

Because of potential problems, the following items should be written instead of using their representative symbols:

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

SpecsIntact Editor Overview

Now that you are familiar with the basic structure of a **UFGS SpecsIntact** Section (detailed in the previous chapters), the **SpecsIntact Editor** offers many easy ways to insert the proper tags and utilize helpful tools via the **SI Editor's Navigator**, buttons, and toolbar options to ensure clean editing.

SI Editor Shortcut Buttons/Toolbars

Shown in the screenshot below is the **SI Editor** menus, the **Toolbar**, and the **Tagsbar**. The toolbars contain a collection of the most frequently used options when editing a specification Section.
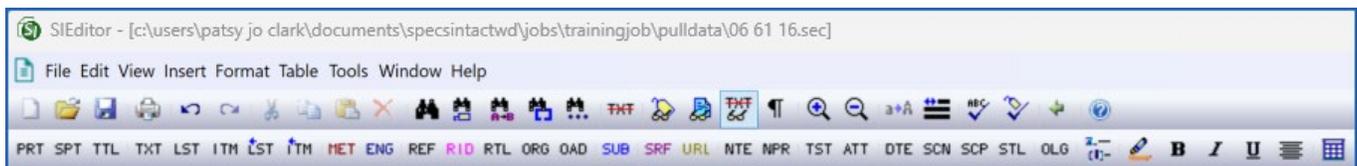
Many common commands are accessible from both the menus and the toolbars. A few of them are familiar Windows-standard functions such as cut, copy, and paste. Others, such as the commands to show or hide screen elements like tags, notes and revisions, are specific to the **SI Editor**.

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

NOTE: When accessing options via the menus, you will also see any applicable keyboard shortcuts that are available to use in lieu of the functions/buttons on the toolbars.

For additional guidance, watch the **SI Editor and Section Structure** eLearning module within **Chapter 3 - Editing**.

SI Editor's Navigator

The **SI Editor's Navigator** layout has the look and feel of a Table of Contents/Bookmarks pane and provides 'jump to' and 'quick editing' functions.
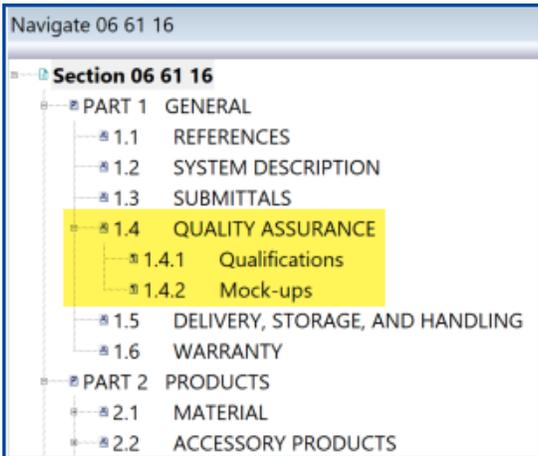
Jump to Subpart: To quickly navigate to a particular Subpart, simply *click* on that Subpart and your cursor will jump to that place in the Section.

Expand/Collapse All: You can easily expand or collapse all Subpart levels by *right-clicking* on any Part or Subpart and selecting either option. You can also manually expand or collapse individual Subparts just by *clicking* on them.

Delete a Subpart: To delete a Subpart quickly and easily (see 1.4 in the picture) simply *click* on that Subpart and *press* the **Delete** key, or *right-click* and *select* **Delete**.

❗ Deleting a Subpart from the **Navigator** must be done with attention to detail. If you delete a Subpart that has additional Subpart levels under it, they will also be deleted (e.g., in the picture above, if 1.4 is deleted, 1.4.1 and 1.4.2 will also be deleted, as they are part of 1.4).

Navigator Icon Descriptions: Icons pictured beside Subparts indicate the Subpart status and current paragraph attributes, as shown below:

For additional guidance, watch **The Navigator** eLearning module within **Chapter 3 – Editing.**

Viewing Sections in the SI Editor

When you open a UFGS Specification Section in the **SI Editor** you have many options on how and what to view in the Section. All options can be found either on the **View** menu or the **SI Editor's Toolbar**. For now, we are focused on the most frequently used ones, that are grouped together on the **SI Editor's Tagsbar**:

1	2	3	4
T̶X̶T̶ Revisions (Shift+F8) Turn revisions on or off	**Toggle Tags View (Alt+S)** Show or hide tags	**Toggle Notes View (Alt+N)** Show or hide notes	**T̶X̶T̶ Toggle Revisions View (Alt+R)** Show or hide revisions

1. **Revisions (Shift+F8)**: If you are required to **Use Revisions** (aka track changes) while performing edits to your Job Sections, then you should have **Revisions** turned on before beginning any edits. Using this feature will place Delete (DEL) tags around all deleted text and will insert Add (ADD) tags around any new text. NOTE: The text within these ADD and DEL tags changes to the applicable red or green color of the tags. This is how the **SI Editor** handles tracking revisions.

2. **Toggle Tags View (Alt +S)**: Always edit with the tags visible on the screen. You can hide tags to check the formatting, but when you make any changes, it is important to view the tags. Following this rule will prevent major errors and possible tagging issues.

   a. Use the **Toggle Tags View** button to quickly toggle **View Tags** off and on or utilize the keyboard shortcut **Alt+S**.

3. **Toggle Notes View (Alt+N)**: Working with Notes visible on the screen is most helpful if you are the specifier doing the editing. If you are not, then you may find it helpful to toggle **View Notes** off so that you have less to look at while editing.

   a. Use the **Toggle Notes View** button to quickly toggle **View Notes** off and on or utilize the keyboard shortcut **Alt+N**.

4. **Toggle Revisions View (Alt+R)**: If you have **Revisions** turned on to track your additions and deletions, you can use the **Toggle Revisions View** button to view or hide all deletions. NOTE: All added text will always be visible.

💡 It is recommended to toggle **View Revisions** ON and OFF frequently while editing as this allows you to check that the formatting and spacing is accurate by hiding the deleted text when **View Revisions** is toggled to OFF.

Viewing Tailoring Options in the SI Editor

When you first open a Section in the **SI Editor**, the **Tailoring Options** window pops up displaying all the available Tailoring Options for the open Section.
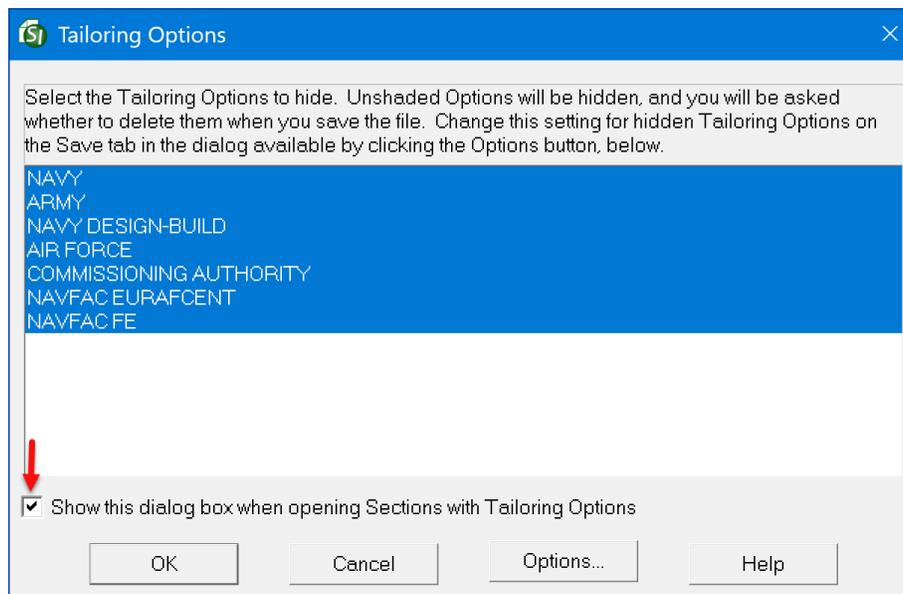

To hide any of them, click to deselect/hide. If you previously deselected any as part of pre-editing your Job, they will already be deselected and possibly redlined here if **Revisions** were on at the time they were pre-edited out.

ℹ️ Additional information on how to view Tailoring Options in the **SI Editor** can be found under the Using Tailoring Options to Pre-Edit a Job topic in this guide.

If **Revisions** are turned ON in the **SI Editor** and you select any Tailoring Options to hide, you will be prompted upon saving the Section if you want to delete all hidden Tailoring Options.

- *Click* **Yes** to permanently delete the hidden Tailoring Options.
- *Click* **No** to keep them hidden but not deleted.
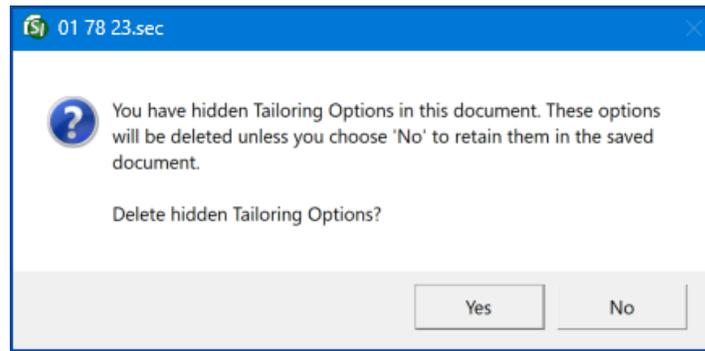
To change whether the Tailoring Options window pops-up by default, *check* or *uncheck* the **Show this dialog box when opening Sections with Tailoring Options** option per your preference (see red arrow in first screenshot above). <u>NOTE</u>: We highly recommend you keep it checked to remind you of the existence of the Tailoring Options each time you open a Section.

If you did not use the pre-editing option to deselect/hide Tailoring Options when you first created a Job, it is not too late to use the **SI Editor's** Tailoring function above or return to the **SI Explorer** to tailor the Sections at the Job level. Either way, Tailoring Options are meant to be a time saver!

Proper Editing Practices in the SI Editor

Clean editing practices are essential to producing an error-free specification Section. The following topics focus on the available techniques and the most recommended editing methods.

First important rule when editing a **SpecsIntact** Section is to always have **View Tags** turned ON.

To display paragraph marks and spaces, either go to the **SI Editor's View** menu and select the **Marks** option or click on the **Show Marks** ¶ button on the Toolbar. Each space will be represented by one dot on the screen.

Editing Tips

Adding and deleting text can be tricky in the **SI Editor**. Some of the best practices and editing methods are outlined below.

💡 As you are editing, the general rule is to leave one blank line between paragraphs. Keep this in mind and add or delete any extra blank lines or spaces as needed while you are adding or deleting text.

Adding New Text

All plain text must be surrounded by formatting tags such as TXT, LST or ITM tags. There are a couple of ways you can accomplish this:

TXT LST ITM

1. *Enter* the text first. Next, *highlight* it and *click* the applicable formatting tag on the **Tagsbar**.

OR:

2. *Place* your cursor where you plan to enter the new text, *click* the applicable formatting tag on the **Tagsbar**, then start *typing* the text inside the tags.

ℹ️ Additional information on the difference in the TXT, LST and ITM text formatting tags can be found under the Text Paragraphs – Indent Levels/Tags topic in this guide.

Deleting Text

It's important to pay attention to exactly what you are deleting in the **SI Editor**. If you only need to delete some of the information between tags, do NOT delete the tags. An example would be:

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

EDIT TO READ:

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

When you remove the words 'in good condition' from the original sentence, you must be careful not to remove the TXT tags, as this will result in untagged text.

❗ Leaving untagged text in a Section can cause formatting issues - at a minimum!

If, on the other hand, you DO want to remove the entire sentence, you would need to include and delete the beginning and ending TXT tags. There are a couple of ways to do this cleanly:

Method 1:

1. *Select* all the information including both beginning and ending tags, either by highlighting it before the beginning TXT tag and after the ending TXT tag.
2. *Press* the **Delete** key on your keyboard to delete the text selection. Alternately, you can *click* the **Delete** button on the **Tagsbar** or *press* **Ctrl+D** which is the keyboard shortcut. Be sure to check your spacing when done to make sure no blank lines or extra spaces are left.

💡 Another method to highlight the text and the tags is to *place* your cursor anywhere inside the TXT tags, then *double-click* to *select* a single word, pause, then *double-click* again to include the rest of the text including the beginning and ending TXT tags in the highlighted text.

Method 2:

1. *Place* your cursor to the immediate left of the beginning TXT tag.
2. *Hold* down the **Shift** key while *pressing* the **Delete** key (**Shift-Del**). This cleanly deletes the tags and the text within them. As always, check spacing and correct as necessary.

🎞 For additional guidance, watch the **Deleting Subparts** eLearning module within **Chapter 3 – Editing.**

Using Revisions to Track Changes

Just as in Microsoft Word, the **SI Editor** provides a way for you to use the **Revisions** function to track your changes as you perform edits.

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**. 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 **Create New Job** window.

When using **Revisions** to track changes, any text that is deleted gets surrounded by Delete (DEL) tags and turns the deleted text red and overstruck, while any newly added text gets surrounded by Add (ADD) tags and turns the text green and underlined. See example below:

<DEL>Unsatisfactory</DEL><ADD>Satifactory</ADD>

To turn the **Revisions** function ON or OFF, you must click on the **Revisions** [TXT] button. You can also choose to show or hide revisions as you are editing by toggling the **View Revisions** [icon] button ON and OFF as you edit. When **View Revisions** is OFF, the **SI Editor** hides any text you have deleted (all text within DEL tags) while displaying anything that has been added (all text inside ADD tags). Turning **View Revisions** OFF after deleting or adding text is recommended to be sure spaces and formatting are correct.

> The recommended practice when using **Revisions** to track changes in the **SI Editor** is to frequently toggle **View Revisions** and **View Tags** OFF and ON to double check the resulting formatting of edits so you can adjust for any extra or missing blank lines or spaces.

> To learn more about using **Revisions**, please refer to the SI Editor Edit Menu – Revisions topic in the Web-Based Help.

Subparts - Tag Placement and Automatic Numbering

When editing a Section, you must be aware of how to properly insert or delete Subparts to ensure the renumbering function works correctly and as expected. It might be helpful to think of Subpart tags being nested inside of each other for each sublevel required.

Adding Subparts

Wherever your cursor is blinking at the time you click the **Subpart** [SPT] button to add a new Subpart determines what level of Subpart gets added. It's recommended to practice adding and deleting Subparts to see the results, but the basic principle is shown in the following examples.

Note that when you click on the **Subpart** [SPT] button, everything that is required to be included in a new Subpart - the Subpart (SPT), Title (TTL), and Text (TXT) tags - are added in the correct locations as shown in the highlighted text below. Additionally, inside both the TTL tags and the TXT tags, brackets are inserted indicating where to enter that information. This takes the guesswork out of having to manually insert every required tag and shows you exactly where to enter the Title and Text.

```
</SPT =1.6> <SPT =1.7>1.7    <TTL>[SUB TITLE]</TTL>

   <TXT>[Text]</TXT>

</SPT =1.7><SPT =1.8>1.8    <TTL>EQUIPMENT</TTL>
```

There are a couple different ways to add a Subpart. One way is the way described above; just click the **Subpart** SPT button and insert a blank Subpart template. In this example, your cursor was placed after the ending Subpart tag of Subpart </SPT =1.6> and when the **Subpart** button was clicked, it added a new Subpart 1.7.

> NOTE: If the new Subpart needs to be inserted as 1.6.1 (a sublevel of 1.6), *place* your cursor just before the ending 1.6 tag |</SPT =1.6> as shown below:

```
</SPT =1.5.1></SPT =1.5><SPT =1.6>1.6    <TTL>[Sub Title]</TTL>

   <TXT>[Text]</TXT>

</SPT =1.6>|<SPT =1.7>1.7    <TTL>[SUB TITLE]</TTL>

   <TXT>[Text]</TXT>

</SPT =1.7><SPT =1.8>1.8    <TTL>EQUIPMENT</TTL>
```

Next, *click* the **Subpart** SPT button and it will insert it at that level as shown below. Note that after the Subpart template is inserted, it leaves your cursor sitting inside the TTL tags ready for you to enter the Title.

```
</SPT =1.5.1></SPT =1.5><SPT =1.6>1.6    <TTL>[Sub Title]</TTL>

   <TXT>[Text]</TXT>

<SPT =1.6.1>1.6.1    <TTL>[Sub Title]</TTL>

   <TXT>[Text]</TXT>

</SPT =1.6.1></SPT =1.6>|<SPT =1.7>1.7    <TTL>[SUB TITLE]</TTL>

   <TXT>[Text]</TXT>

</SPT =1.7><SPT =1.8>1.8    <TTL>EQUIPMENT</TTL>
```

✋ Be very mindful of where you place your cursor before clicking the **Subpart** SPT button so you get the expected Subpart level.

Promoting Subparts

To easily increase the Subpart level, *click* on the applicable Subpart in the **Navigator**, *right-click* on it and *select* **Promote Subpart** (e.g., *right-click* on 1.6.1 to promote it to 1.7). This moves it to 1.7 and automatically renumbers the original 1.7 Subpart to 1.8.

ℹ️ If you have **Revisions** and **View Revisions** turned ON, the above actions will include DEL tags around the original promoted Subpart (1.6.1) and ADD tags around the newly promoted (1.7) Subpart. The **Revisions** tracking in the **SI Editor** considers the sublevel Subpart (1.6.1) to be a deletion and the new (1.7) Subpart to be an addition. See the example of this below.

Deleting Subparts

There are a few different ways to delete a Subpart. These ways are defined and explained below in detail.

💡 Deleting Subparts can be tricky. This requires full attention so that more Subparts than expected do not get deleted. For instance, if you are wanting to delete 1.6, but not 1.6.1, deleting 1.6 in any of the suggested ways noted below will also result in 1.6.1 getting deleted, as it is part of 1.6. You would need to keep 1.6 and its title but delete any content under it <u>OR</u> promote 1.6.1 to 1.6 and capitalize that title.

Method 1: The easiest and most preferred way to delete an entire Subpart is from the **SI Editor's Navigator**. Simply *click* on the Subpart and either *press* the **Delete** key on your keyboard, the **Delete** shortcut keys (**Ctrl+D**), or *right-click* on the Subpart you want to remove and *select* **Delete** from the menu.

Using the **SI Editor's Navigator** to delete Subparts cleanly includes all the applicable beginning and ending Subpart (SPT) tags associated with that Subpart when you select and delete if from the **Navigator**. Whereas, when you choose to highlight and scroll to select a Subpart, it is sometimes easy to miss including all the applicable tags, which can then possibly cause Section validation errors.

WARNING: Be aware that if the Subpart you are deleting (e.g., 1.4 highlighted below) contains additional sublevel Subparts, those sublevel Subparts 1.4.1 and 1.4.2 will also be automatically deleted, as they are considered part of Subpart 1.4. To avoid this, start with all the Subparts expanded so you can view all the sub-level Subparts. When **Revisions** are turned ON, the **SI Editor** displays the deletion as shown below.

NOTE: The deletions are visible in both the **SI Editor Navigator** and the Section itself.

Clicking the **DEL** [×] button on the **SI Editor Tagsbar** while selecting a Subpart in the **SI Editor Navigator** only deletes the Subpart Title, not the Subpart. This is because when you click on a Subpart from that pane, by default it only highlights the title in the **Editing**

window and the **Toolbar** buttons apply to the text in the **Editing** window not the **Navigator**. See the example below:
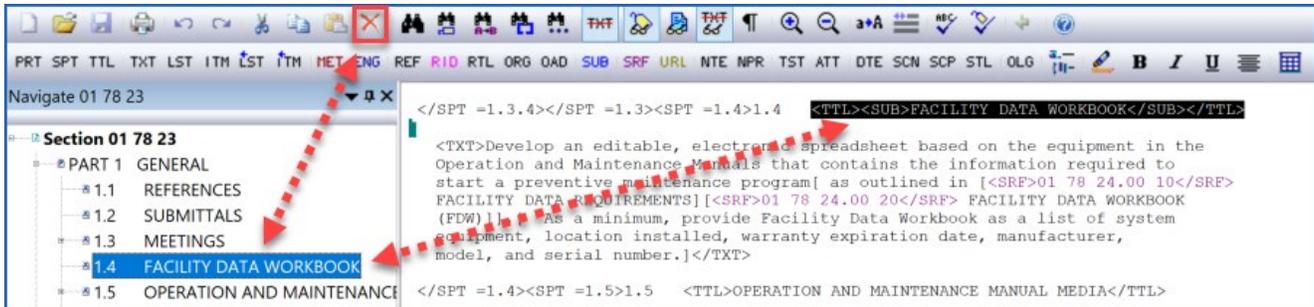
Method 2: *Place* your cursor just before the beginning Subpart tags (e.g., <SPT =1.6.1> below) and *press* the **Shift+Del** keys on your keyboard. This will cleanly delete everything from that beginning <SPT =1.6.1> tag to the corresponding ending </SPT> tag.

💡 Note that this method of using **Shift+Del** works to delete any pair of tags and the text within them, not just Subparts.

Method 3: You can *highlight* the whole Subpart from the beginning SPT tag to the ending SPT tag then either *press* the **Delete** key on your keyboard, the **Delete** shortcut keys (**Ctrl+D**), or *right-click* on the highlighted text and *select* **Delete.**

❗ In the **SI Editor**, it is not recommended to *click and scroll* to highlight large blocks of text when editing a **SpecsIntact** Section. If this is necessary, it is recommended for you to *scroll* slowly and methodically and pause frequently while scrolling to *select* text. Sometimes if you are *highlighting and scrolling* too fast, the **SI Editor** can lock up on you.

🎞 For additional guidance on adding and deleting Subparts, watch the **Subparts** eLearning module within **Chapter 3 - Editing.**

Un-Deleting Subparts

There are several ways to undelete a Subpart. Here are a few methods:

1. **Undeleting a Subpart from the SI Navigator:**

   a. *Right-click* on the deleted Subpart and *select* **Undelete**. The DEL tags are removed but the text is left and therefore undeleted.

2. **Undeleting a Subpart from the SI Editor:**

   a. To undelete a Subpart in the **SI Editor**, you must *highlight* all the deleted text, including the beginning and ending DEL tags, then *right-click* on the highlighted/deleted text and *select* **Undelete Redlined Revisions**. The DEL tags are removed but the text is left and therefore undeleted.

   b. Another way to undelete a Subpart in the **SI Editor** is to *place* your cursor just after the beginning SPT tag or just before the ending SPT tag, then *right-click* and *select* **Remove Tags**. You are asked to confirm it is the DEL tags you are wanting to delete. *Click* **Yes**. The DEL tags are removed but the text is left in and therefore undeleted.

Bracket Replacement Tool

SpecsIntact offers a **Bracket Replacement Tool** in the **SI Editor**. This helpful tool aids you in quickly and efficiently stepping through and making choices on all bracketed options in a Section. To activate this tool, simply click the **Bracket Replacement** [icon] button on the **SI Editor's Toolbar**. The **Replace Bracketed Text** window pops up and jumps to the first set of bracketed options, as shown below:
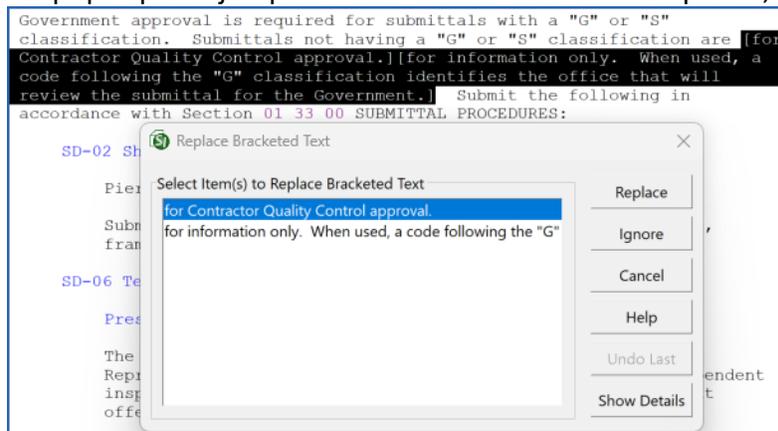
You can select one, none or both bracketed options. You can also choose to **Ignore** this set of brackets and jump to the next set. In the example above, you chose to keep the first option by selecting it to keep it. To proceed with keeping the top bracketed option and deleting the second option, click the **Replace** button. This results in the brackets around the first option being deleted, and the second option being deleted or redlined out in its entirety, as shown below with **View Revisions** turned ON:

```
Government approval is required for submittals with a "G" or "S"
classification.  Submittals not having a "G" or "S" classification are ][for
Contractor Quality Control approval.][for information only.  When used, a
code following the "G" classification identifies the office that will
review the submittal for the Government.]  Submit the following in
accordance with Section 01 33 00 SUBMITTAL PROCEDURES:
```

With **Revisions** turned OFF:

```
Government approval is required for submittals with a "G" or "S"
classification.  Submittals not having a "G" or "S" classification are for
Contractor Quality Control approval.  Submit the following in accordance
with Section 01 33 00 SUBMITTAL PROCEDURES:
```

IMPORTANT: Be aware that you must click on (highlight) the bracketed option you want to keep before you click the **Replace** button. If you don't, it will be removed.

💡 When it comes to using the **Bracket Replacement Tool** - REMEMBER – *Click* it to **KEEP** it!

Bracket Replacement Tool Options

The first thing to be aware of when using this tool is what the options on the **Replace Bracketed Text** window are and what each of them mean. See the screenshot of this tool and a definition of each below.
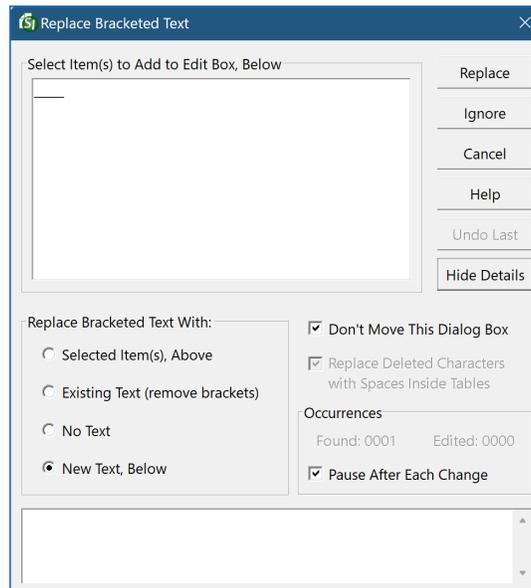
a. **Select Item(s) to Add to Edit Box, Below**: This is the part of the window where the currently selected bracketed option(s) appear. You must *select* each applicable bracketed option you wish to keep. Then *click* the **Replace** button. See the list of all the available buttons/options to choose from:

-   **Replace** - Replaces bracketed item(s) based on your other selections.
-   **Ignore** - Ignores this bracketed option and moves to the next one.
-   **Cancel** - Cancels the **Bracket Replacement Tool** and closes the window.
-   **Help** - Loads the related **Bracket Replacement Tool** help topic.
-   **Undo Last** - Only available if you already performed at least one **Bracket Replacement**.
-   **Hide Details** - Hides the additional bottom options in this tool. If already hidden, this button displays as **Show Details** which when clicked displays the options as shown above.

b. **Replace Bracketed Text With**: *Choose* which option to apply to the selected bracketed option in the top pane of the **Replace Bracketed Text** window. See a list of all available options:

-   **Selected Item(s), Above** - If an item was *selected* and then the **Replace** button was *clicked*, just the selected bracketed option in the main window is left, and all other text and brackets are removed.
-   **Existing Text (remove brackets)** - If selected and you *click* the **Replace** button, just the brackets around the bracketed text will be removed, leaving the text within the brackets behind.

- **No Text** - No text or brackets are left; it is all deleted.
- **New Text, Below** - The bottom pane of this box is where you type in your own replacement text. As soon as you *click* in this bottom pane, this option is automatically selected. Any text you *type* here will be inserted in place of the selected bracketed option(s) in the top pane.

c. **Don't Move This Dialog Box**: The screen position of the dialog box (window) will remain fixed when this box is checked, even if it covers the selected bracketed options in the Section. When this box is unchecked, the dialog box (window) will move with each occurrence to allow you to see the location of the bracketed options within the Section text.

d. **Pause After Each Change**: This is a recommended option so you can be sure to check spacing is correct as changes are being made.

Additional information on the **Bracket Verification Report** can be found under the Bracket Verification topic in this guide.

For additional guidance, watch the **Brackets** eLearning module within **Chapter 3 – Editing**.

Inserting Formatted Tables

Inserting a table in a **SpecsIntact** Section has never been easier since the implementation of the

Formatted Tables feature. To insert a new table, simply click the **Formatted Table** button on the **SI Editor's Tagsbar**. This brings up the **Insert Table** window with a default number of columns, rows, header rows, and table border information to get you started:
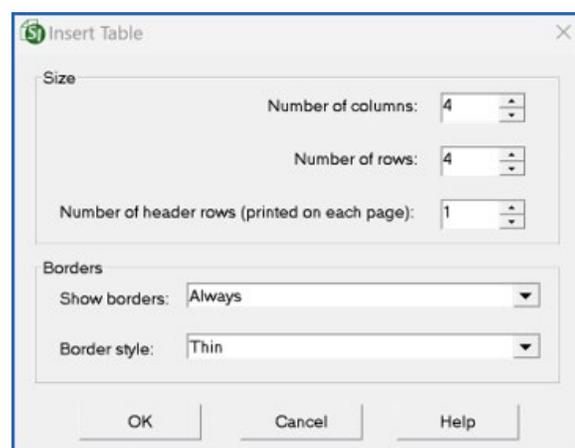
Insert Table Options

You can choose how many columns and rows you want and indicate if one or more header row(s) are applicable. Additionally, you can choose when to display the border, with three choices of border styles to choose from.

    a. **Size**:

        1. **Number of columns** - default setting is 4
        2. **Number of rows** - default setting is 4
        3. **Number of header rows (printed on each page)** - default setting is 1

    b. **Borders**:

        1. <u>**Show borders**</u>:
            1. Never
            b. Only on Screen
            c. Only when Printing
            d. Always *(default)*

        2. <u>**Border styles:**</u>
            a. Thin *(default)*
            b. Medium
            c. Thick

Additional Table Functions

SpecsIntact offers some additional functions for customizing and editing tables.

Changing Row Heights and Column Widths

Among the available menu options for tables are those that allow you to adjust row heights and column widths based on the whole table or on selected cells. These menu options include, **Row Height**, **Column Width**, **Make Selected Rows Same Height**, and **Make All Columns Same Width**.

1. To adjust the row heights or column widths on selected cells and make them the same size, you must highlight all the rows (or columns) you wish to adjust, then *right-click* and *select* the applicable option.

2. To make all the rows or columns in the whole table the same size, you can simply *hover* over the table (without clicking in any cell), *right-click* and *select* the applicable option.

❗ If you get unexpected results, *click* outside of the table, and *click* the **Undo** button. You can also manually adjust the row heights and column widths by dragging them to the desired height or width.

💡 When manually adjusting row heights one by one, it is important to note that they are aligned to a grid and must be adjusted from the bottom of the table upward. If borders are not dragged far enough, they'll snap to the closest grid line, which might result in the row being too small to contain the text.

Importing/Exporting an Excel Table

SpecsIntact does provide the functionality for importing and/or exporting tables to and from Excel. However, this is NOT a cut and dried process. Additionally, due to Microsoft security restrictions on government systems, the copy-and-paste method from the Excel file into a pre-inserted formatted table in the **SI Editor** is the recommended method to use.

❗ To copy and paste from an Excel spreadsheet into a **SpecsIntact** table, you first need to create a table in the **SI Editor** with the same exact number of rows and columns as the Excel spreadsheet. Then you can copy-and-paste the data into the table.

Table Menus - Hover Menu vs. Edit Mode Options

When working with Tables in **SpecsIntact**, you have two **Right-click** menus available to you: the **Hover** menu and the **Edit Mode** menu. When you hover over the table and right-click, the table **Hover** menu pops up with access to functions and settings such as **Merge/Unmerge Cells**, **Justify**, **Row Height**, **Column Width**, **Insert Rows/Columns**, **Delete**, **Select Table**, **Properties**, etc.

When you are in **Edit Mode** in a table cell (by double-clicking or left-clicking in any cell), you have access to the commonly used editing functions such as **Cut, Copy, Delete, Paste**, and the three **Revisions** functions, along with the main **Table** menu at the bottom. More than likely, most of what you will need to do can be accomplished through the **Hover** menu. See examples of each menu below:

Table 'Hover' Menu

Unmerge All Cells	
Justify	▶
Set Background Color for	▶
Clear Background Color for	▶
Insert	▶
Delete	▶
Row Height...	
Column Width...	
Make All Rows Same Height	
Make All Columns Same Width	
Import Excel XML Spreadsheet...	
Export Excel XML Spreadsheet...	
Show Column Headers	
Select Table	
Properties...	

Table 'Edit Mode' Menu

Undo	Ctrl+Z
Copy	Ctrl+C
Cut	Ctrl+X
Delete	Ctrl+D
Paste	Ctrl+V
Select All	Ctrl+A
Undelete Redlined Revisions	Ctrl+U
Delete Added Revisions	Ctrl+T
Remove All Revisions	Ctrl+L
Table	▶

ⓘ There are a couple of things you need to be aware of while working in **Edit Mode** in a table. When tags are present, the tags **Color** attribute is not visible until you click out of the cell. For instance, if there is a Reference Identifier (RID) in the cell, its color only shows up if your cursor is not inside the cell. 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.

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

Using Revisions with Formatted Tables

For the best experience editing **Formatted Tables** when you have **Revisions** turned ON, it is recommended that you first duplicate (copy) the **Formatted Table** including all applicable tags and paste the whole table below the original. Then, go back up to the original table and delete it in its entirety. This will mean you only have one set of DEL and ADD tags: DEL tags around the original table and ADD tags around the table you are editing. This makes the **Formatted Table** much easier to read as you are editing since multiple DEL and ADD tags won't be inserted.

To copy and paste information from one table into another, follow these steps:

a. First, without clicking IN the table, just *hover* over the table and *right-click*.

b. Next, *choose* **Select Table**. This selects/highlights the entire table, including the necessary table tags.

c. Once the table is highlighted, *right-click* and *select* **Copy** to copy the table, then *right-click* and *select* **Delete**. The table gets redlined out and DEL tags are placed around it.

d. Before moving your cursor, *right-click* and *select* **Paste** to paste a copy of the table immediately below the deleted one. The duplicate table is inserted with ADD tags around it. See example below:

```
<DEL><TAB HEADERROWS=2 WIDTH=84>
```

Exposure class	Maximum expansion when tested using ASTM C1012/C1012M		
	At 6 months	At 12 months	At 18 months
S1	0.10 percent	N/A	N/A
S2	0.05 percent	0.10 percent^	N/A

```
</TAB></DEL><ADD><TAB HEADERROWS=2 WIDTH=84>
```

Exposure class	Maximum expansion when tested using ASTM C1012/C1012M		
	At 6 months	At 12 months	At 18 months
S1	0.10 percent	N/A	N/A
S2	0.05 percent	0.10 percent^	N/A

```
</TAB></ADD>
```

Additional information and Formatted Table tips can be found under the Table Formatting and Editing Tips topic in this guide.

For additional guidance, watch the **Tables** [eLearning](#) modules within **Chapter 3 – Editing.**

Post Editing Tips

After editing a Section, check the formatting by hiding all the on-screen elements that won't appear in the printed document (e.g., Tags, Revisions, Notes, Formatting marks, etc.) and scan the entire Section for any missing or extra blank lines or spacing issues.

NOTES:

1. There should be one blank line between paragraphs.

2. Before making any changes to adjust the formatting, don't forget to turn **View Tags** back on to avoid inadvertently deleting content you did not mean to.

Understanding Process and Print/Publishing

One of the things that sets **SpecsIntact** apart from word processing programs are the automated features and reports that help assure the quality of your finished specifications. The QA tools and reports can help you find problems so that you can correct them before you publish the final product.

Since the **Process & Print/Publish** option 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**, by first selecting the Job, and then either right-clicking on it and selecting the **Process and Print/Publish** menu option or clicking on the **Print/Publish** button on the **SI Explorer's Toolbar**.
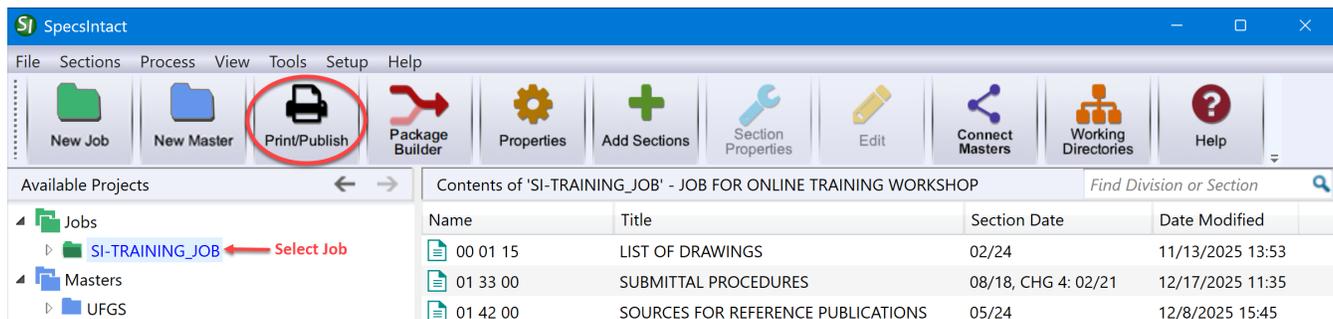
Print Processing Window and Option Tabs

From the **Print Processing** window, you can choose from many options on the applicable tabs.

While we have previously visited the **Print Processing** window, let's look at some other important options and processes that you can access from this window beyond just printing. We'll go through each tabbed screen and point out important things to understand about each of them. As you will see, selecting certain options on one tab can affect other options on another tab and produce different results when printing.

Choose the printer from the drop-down **Printer** option. Unless you are printing to a physical printer, we recommend you select the **SpecsIntact PDF** printer for the best results.

The following **Printer** and **Print Processing** window options and buttons are visible at the bottom of each of the **Print Processing** tabs:
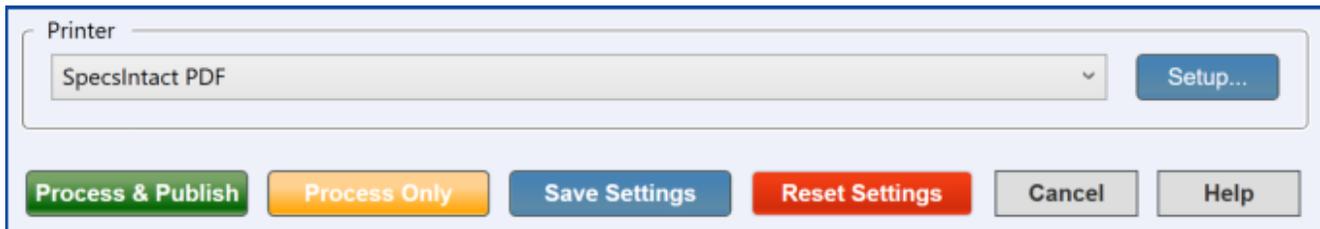
- **Process and Publish**: Processes and publishes the reports and/or Sections.

  💡 If printing to PDF, not only will **SpecsIntact** create the .PRN, .RPT, and .TOC files under that Job's **Processed Files** folder, but it will also produce PDFs of the Sections, reports and Table of Contents files under the **PDF Files** folder.

- **Process Only:** Runs and creates only the report files on the selected Section(s) and the Section (.PRN) print files, but it will not print or generate PDFs or Word versions of the Section(s) themselves. It ONLY creates print versions of the Sections, reports and/or TOC files.

- **Save Settings:** Saves the choices made on the individually tabbed screens (except for Sections selected to be processed/printed) so that the next time the window is opened, the selections you save will be your new defaults on each tab.

- **Reset Settings:** Resets any custom settings on all tabs to their default settings.

- **Cancel**: Closes the **Print Processing** window.

- **Help**: Takes you to **Print Processing** related help topics on the **SpecsIntact** Help webpage.

Print Processing – Sections Tab

The **Sections** tab has many options available when processing a Job.

Select Sections

Select to process **All Sections** or **Some Sections**. If you select **Some Sections**, you can select one or more Sections.
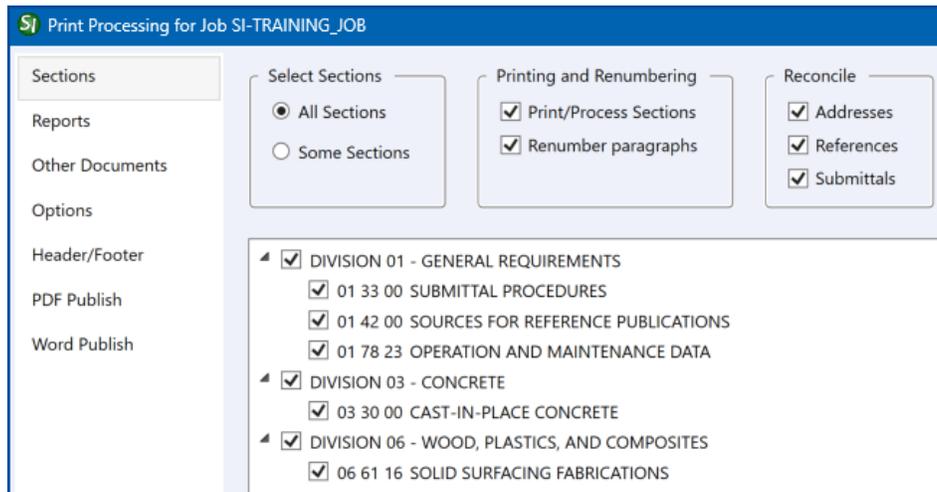
All selected **SpecsIntact** Sections are processed, and the print (.PRN) versions of each Section are then generated and placed in the applicable Jobs **Processed Files** subfolder. These .PRN files are a copy of the edited Section (.SEC) files. **SpecsIntact** applies the selected print options and reconciliation processes to these instead of the actual editable Section (.SEC) files. This is how **SpecsIntact** keeps the editable Section (.SEC) files 'in-tact' during the reconciliation processes (e.g., when an unused Reference is stripped from the Reference Article of a Section). These changes are applied to the print (.PRN) version of the Sections, so if you were to open the print (.PRN) version of the Section, you would likely find the list of References much shorter than the editable (.SEC) version, as unused ones would have been stripped at time of print.

Printing and Renumbering

- **Print/Process Sections**: When checked, this means the Sections themselves will be processed and printed along with any reports, etc. that have been selected on the **Reports** tab. If you do not check this box, then only the selected reports, etc. will be processed based on the selected Sections, but not the Sections themselves. *This option is checked by default.*

- **Renumber paragraphs**: When checked, **SpecsIntact** will automatically renumber the paragraphs within each Section per the edits made in them. *This option is checked by default.*

Reconcile

When running **Print Processing** on a Job, all three of the **Reconcile** processes (**Addresses**, **References** and **Submittals**) are checked by default. Although you are allowed to deselect them, it would be a rare

circumstance that you would not want all three of these to process every time you **Print/Publish** the Job. *All three (3) of these reconciliation processes are checked by default.*

Address Reconciliation

Reconciles the 01 42 00 Sources for Reference Publications (Address) Section by removing any Reference Organizations from this Section that were not used throughout the Job, leaving behind only those Reference Organizations you have used.

> The 01 42 00 Section is required in every project and is added by default when you create a new Job.

> Additional information on Address Reconciliation can be found under the Section 01 42 00 (Address Section) and the Address Reconciliation and Verification Report topics in this guide.

Reference Reconciliation

Reconciles Reference Standards within each Section by removing any Reference Standards from the '1.x REFERENCES' Article of the Section that are no longer being used elsewhere in the Section due to being edited out. This means you end up with just a list of the Reference Standards you cited in the Section in the Reference Article of each of your Sections.

> Additional information on Reference Reconciliation can be found under the Reference Reconciliation and Verification Report topic in this guide.

Submittal Reconciliation

Reconciles the 01 33 00 Submittal Procedures Section by removing any unused Submittal Descriptions (SD-01 through SD-11) from this Section that were not used throughout the Job, leaving behind only those Submittal Descriptions that were cited.

> The 01 33 00 Section is required in every project and is added by default when you create a new Job.

> Additional information on Submittal Reconciliation can be found under the Section 01 33 00 Submittal Procedures topic in this guide.

> For additional guidance, watch the **Section Tab** eLearning module within **Chapter 4 – Process and Print/Publish.**
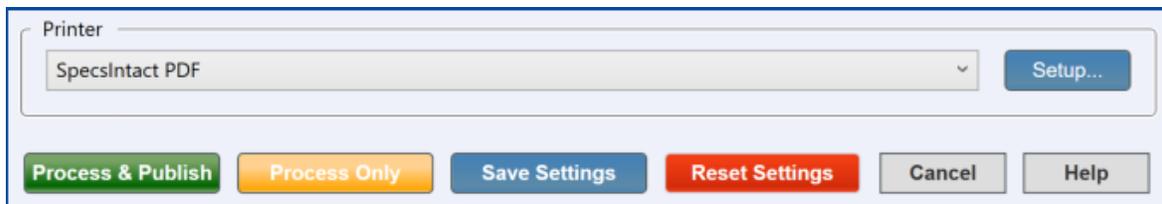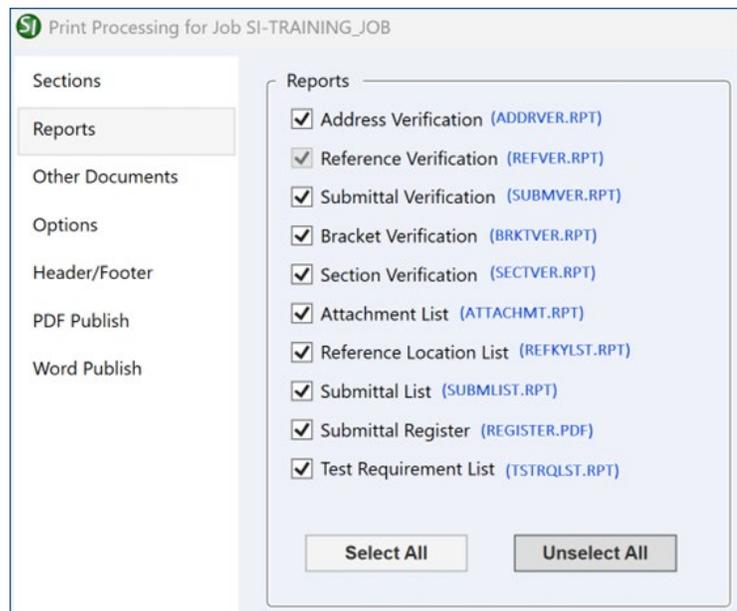
Print Processing – Reports Tab

The **Reports** tab of the **Print Processing** screen allows you to select any or all 10 available **SpecsIntact** reports to process and/or print for the selected Sections.
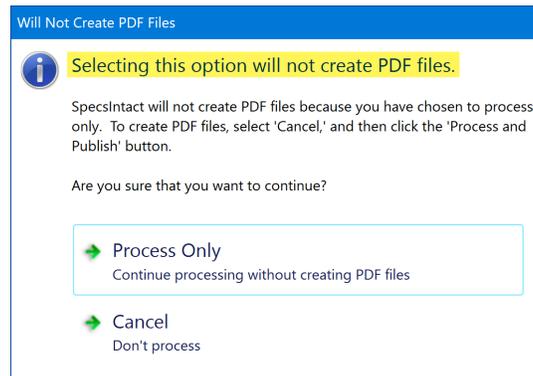
Report Selection

Check the boxes beside the reports you wish to produce.

The top five (5) Verification reports are checked by default on all new Jobs and are generated when you select either the **Process & Publish** or **Process Only** button.

NOTE: If you choose the **Process Only** option, you get a warning:

For additional guidance, watch the **Reports Tab** eLearning module within **Chapter 4 – Process and Print/Publish.**

Report Storage and Generation

As reports are generated, they are placed in the applicable Job subfolder, based on what type of file they are. Whether you click the **Process Only** button or the **Process & Print** button, the software will always create the processed files (.PRN & .RPT) and place them in the **Processed Files** folder under the Job.

1. **Processed Files** folder: This Job subfolder is created the first time you print/publish your Job files.

   - All Print (.PRN) files and Report (.RPT) files that are generated during publishing and/or processing are saved in the Job's **Processed Files** subfolder as shown below:

PDF and Word files are only generated when you click the **Process & Print** button and are placed in the **PDF Files** and **Word Files** folders, respectively.

1. **PDF Files** folder: This Job subfolder is created the first time you print/publish your reports and Section files to PDF. To publish to PDF, you must click the green **Process & Publish** button.

   - All generated PDF files (Sections and reports) are saved in the **PDF Files** subfolder as shown below:

! Note that the Submittal Register (e.g., REGISTER.PDF) report can only be printed as a PDF file. The **Process Only** button will not generate this report.

2. **Word Files** folder: This Job subfolder is created the first time you print/publish your Section files to Word. To publish your Sections to Word, you must click the green **Process & Publish** button.

   • All generated Section Word files are saved in the **Word Files** subfolder as shown below:

🎞 For additional guidance, watch the **PDF Publish Tab** and **Word Publish Tab** eLearning modules within **Chapter 4 – Process and Print/Publish.**

Verification Reports

The following QA reports point out errors in your project. You should fix all identified issues by the final phase of the project to make sure your Job information is accurate and complete.

Address Verification

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

❗ Address Organizations are recognizable by the Organization (ORG) tags that surround them (e.g., <ORG>AMERICAN NATIONAL STANDARD INSTITUTE (ANSI)<ORG>).

ℹ️ Additional information on Addresses can be found under the Section 01 42 00 (Address Section) and Address Reconciliation and Verification Report topics in this guide.

🎞️ For additional guidance, watch the **Address Verification Report** eLearning module within **Chapter 6 – Correcting QA Report Errors and Discrepancies.**

Reference Verification

The **Reference Verification** provides results in two distinct reports for easier review:

1. Generates the **Reference Verification Report** (REFVER.RPT). This report lists any missing Reference Standards from all Sections that were cited in the text but are not also listed in the Reference Article along with their corresponding organization date and title details.

2. Generates the **Reference Title Discrepancies Report** (TTLDIFFS.RPT). This report lists Reference Identifiers (RIDs) with conflicting Reference Titles in two or more Reference Article Sections within the Job.

ℹ️ References are recognizable by the Reference Identifier (RID) tags that surround them and their purple/pink color (e.g., <RID>ANSI C31.9<RID>).

ℹ️ Additional information on References can be found under the Section 01 42 00 (Address Section) and Reference Reconciliation and Verification Report topics in this guide.

For additional guidance, watch the **Reference Verification Report** eLearning module within **Chapter 6 – Correcting QA Report Errors and Discrepancies.**

Submittal Verification

The **Submittal Verification** (SUBVER.RPT) lists any Submittal Items from all Sections that were cited in the text but are not listed in the Submittal Article and vice-versa. The bottom Section of this report indicates any SD-XX Submittal Descriptions that do not match up to the standard SD-01 through SD-11 that are listed in the 01 33 00 Submittal Procedures Section.

Submittals are recognizable by the Submittal (SUB) tags that surround them and their blue color (e.g., <SUB>SD-03 Product Data<SUB> or Submittal Item; _{Formwork Materials}).

Additional information on Submittals can be found under the Submittal Reconciliation and Verification Report topic in this guide.

For additional guidance, watch the **Submittal Verification Report** eLearning module within **Chapter 6 – Correcting QA Report Errors and Discrepancies.**

Bracket Verification

The **Bracket Verification** (BRKTVER.RPT) lists any outstanding [bracketed options] alerting specifiers to go back and make the necessary bracketed choices indicated.

Additional information on Bracketed Options can be found under the Bracket Replacement Tool topic in this guide.

For additional guidance, watch the **Bracket Verification Report** eLearning module within **Chapter 6 – Correcting QA Report Errors and Discrepancies.**

Section Verification

The **Section Verification** (SECTVER.RPT) lists any Sections that were cited in the text that are not included in the Job/Project.

ⓘ Additional information on Section References can be found under the [Section Verification Report](#) topic in this guide.

🎞 For additional guidance, watch the **Section Verification Report** [eLearning](#) module within **Chapter 6 – Correcting QA Report Errors and Discrepancies.**

Information Only Report Lists

The following lists are just for your information. They help you find where things like References and Submittals are located, but they don't mean there is anything wrong with your project that needs fixing.

Attachment List

The **Attachment List** (ATTACHMT.RPT) lists all the Attachments cited in the Job, followed by the Section number along with the Subpart numbers where they can be found. This also serves as a notification for the specifier to remember where to manually insert these external attachments in the final/complete project. NOTE: This is an information-only report.

Reference Location List

The **Reference Location List** (REFKYLIST.RPT) lists all the References cited in all the Job Sections and Notes along with the Subpart numbers where they can be found. NOTE: This is an information-only report.

Submittal List

The **Submittal List** (SUBMLST.RPT) lists all the Submittal Descriptions (SD-01 through SD-11) cited in all the Job Sections along with the Subpart numbers where they can be found. NOTE: This is an information-only report.

Submittal Register

The **Submittal Register Report** (REGISTER.PDF) can only be produced when published to PDF. So, when generated, it is published and placed in the Jobs **PDF Files** folder. This report (produced in spreadsheet-like format) lists the materials, products and items for each Submittal cited in the Job, as well as the Section and Subpart number where each of these is located. Additionally, any required

Government or Reviewer codes are also displayed in the Classification column next to the applicable submittal item.

Test Requirements List

The **Test Requirements List** (TSTRQLST.RPT) lists all the Test Requirements cited in all the Sections, along with the Section and Subpart numbers in which they can be found. <u>NOTE</u>: This is an information-only report.

Print Processing – Reports Tab/Table of Contents

The **Section Table of Contents** and the **Project Table of Contents** section of the **Reports** tab allow you to select what kind of Section and/or Project TOC you want to publish. The default is no TOC options are selected for either type of TOC.

- **Section Table of Contents**
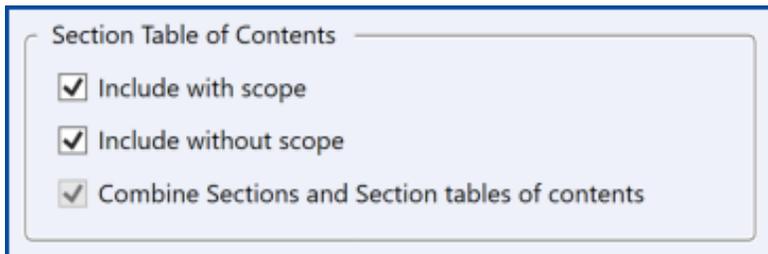
- o **Include with scope**: The scope of the Section can be found in the very first informational note at the top of every **UFGS Master** Section as shown below. The scope information is identified by the Scope (SCP) tags that surround the applicable text.

If you choose to include the scope in the Section TOC, the scope note from the Section is inserted in the Section TOC below the Section Date information as highlighted below:

- o **Include without scope**: The scope note is not included anywhere in the published Section TOC.

- o **Combine Sections and Section tables of contents**: If you choose this option then the processed (.PRN) Sections and the published (.PDF) Sections will do just that and place the selected TOC at the beginning of each Section instead of publishing the TOC as a separate file.

- **Project Table of Contents**

- o **Include with scope**: Example of Project Table of Contents with Scope Note shown below:

```
                    PROJECT TABLE OF CONTENTS

DIVISION 01 - GENERAL REQUIREMENTS

01 33 00         08/18, CHG 4: 02/21 SUBMITTAL PROCEDURES
                 general procedures regarding submittals, data normally
                 submitted for review to establish conformance with the
                 design concept and contract documents

01 42 00         05/24                SOURCES FOR REFERENCE PUBLICATIONS
                 listing of organizations whose publications are referenced
                 in other sections of the specifications.

01 78 23         05/23                OPERATION AND MAINTENANCE DATA
                 Operation and Maintenance (O&M) data packages, manuals and
                 training


DIVISION 03 - CONCRETE

03 30 00         02/19, CHG 9: 08/24 CAST-IN-PLACE CONCRETE
                 cast-in-place concrete not exposed to a marine or high
                 chloride environment


DIVISION 06 - WOOD, PLASTICS, AND COMPOSITES

06 61 16         08/20                SOLID SURFACING FABRICATIONS
                 solid polymer and quartz agglomerate (or "engineered
                 quartz") fabrications


-- End of Project Table of Contents --
```

- o **Include without scope**: Example of a Project Table of Contents without Scope Note shown below:

```
                    PROJECT TABLE OF CONTENTS

DIVISION 01 - GENERAL REQUIREMENTS

01 33 00         08/18, CHG 4: 02/21 SUBMITTAL PROCEDURES
01 42 00         05/24                SOURCES FOR REFERENCE PUBLICATIONS
01 78 23         05/23                OPERATION AND MAINTENANCE DATA

DIVISION 03 - CONCRETE

03 30 00         02/19, CHG 9: 08/24 CAST-IN-PLACE CONCRETE

DIVISION 06 - WOOD, PLASTICS, AND COMPOSITES

06 61 16         08/20                SOLID SURFACING FABRICATIONS

-- End of Project Table of Contents --
```

- o **Include Division 00**: If checked any Division 00 Sections (documents) in the Job will also be included in the Project Table of Contents.

o **List any unused divisions in the project table of contents**: If checked, then all unused **UFGS Master** Divisions will still be listed in the Project Table of Contents.

For additional guidance, watch the **Reports Tab** eLearning module within **Chapter 4 – Process and Print/Publish.**

Print Processing – Other Documents Tab

On the **Other Documents** tab, there are settings you can choose to apply to any documents contained in the Job. For instance, a cover page for the project.
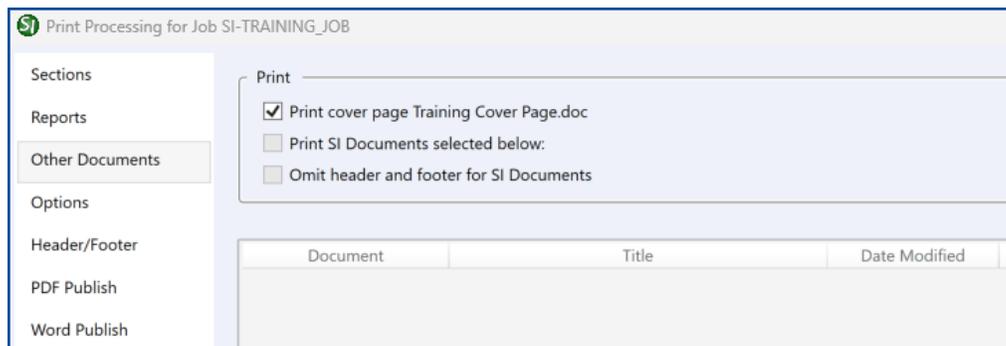
NOTE: If the Job does not contain any documents, all the options on this **Print Processing** window are not applicable and therefore will be unavailable.

Print Processing – Options Tab

On the **Options** tab, the **Show** section is one of the most important group of options on this tab. This is where you choose what Section components you want to show when you print the Section(s).

For detailed recommendations on what options to choose when printing or publishing Sections to be marked up for the very first time, please refer to the Print Recommendations for Sections Prior to First Markups topic in this guide. The recommended options are shown/checked below:
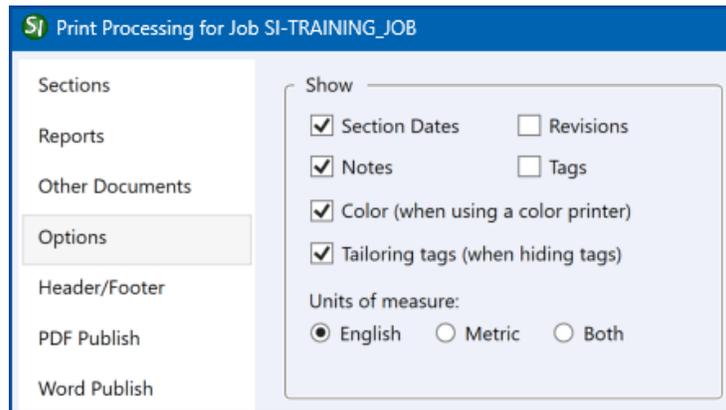
The logic behind selecting these print options for the first round of edits are listed below:

- **Section Dates**: Printing with the Section Dates assures the specifier they are starting with the latest version of the Section to begin the project.

- **Notes**: Printing with the Notes showing is important because they often contain valuable information that assists the specifier in marking up the text accurately.

  (i) Always initially print with Specifier Notes showing when printing Job Sections for a new project.

- **Color (when using a color printer)**: Printing or producing the PDF files showing the colors makes the **SpecsIntact** components stand out and they become easily recognizable as References, Submittals, Section References, Tailoring Options, English measurements, etc.

- **Tailoring tags (when hiding tags)**: When printing with colors, Tailoring Options are easy to recognize because they are all colored teal. However, you cannot tell what the specific Tailored Option text is designated as unless you select this option and print the Tailoring tags (e.g. **ARMY**, **NAVY**, **AIR FORCE**).

  ! It is recommended to print with both the **Color (when using a color printer)** and **Tailoring tags (when hiding tags)** showing when printing Job Sections for almost all phases of a project, except possibly the final submittal phase. This aids the specifier in being able to quickly identify References, Submittals, Section References, and specific Tailoring Options at a glance.

- **Units of Measure**: Select the applicable unit of measure (**English**, **Metric** or **Both**) for the current project to include in the printed/published Sections. Only the selected option will be printed/published, the other unit of measure will be hidden unless you choose **Both**.

- **Revisions**: When printing, this option will produce the printed/published Sections showing all Revisions (additions and deletions). In early submittal phases, this is likely to be a requirement until the project is finalized.

- **Tags**: Print showing all tags in the Section(s). This may be helpful to pinpoint possible tagging errors.

    💡 When printing or publishing Sections for later submittal phases, you may want to adjust these options accordingly. For instance, after the first few rounds of edits you may not want to include the Sections Dates or Notes in the printed or published Sections as the specifier likely doesn't need to see this information at that point.

    🎞 For additional guidance, watch the **Options Tab** <u>eLearning</u> module within **Chapter 4 – Process and Print/Publish.**

Print Processing – Header/Footer Tab

On the **Header/Footer** tab, **SpecsIntact** offers you the options of having a maximum of two lines in both your Header and Footer for printed and/or published Sections, Table of Contents and reports. Additionally, you can choose where that information is printed on the applicable Header or Footer line at the **Left/Right/Center** alignment location.

SpecsIntact can automatically grab and insert information from any of the fields of the **Properties for Job** window shown below:
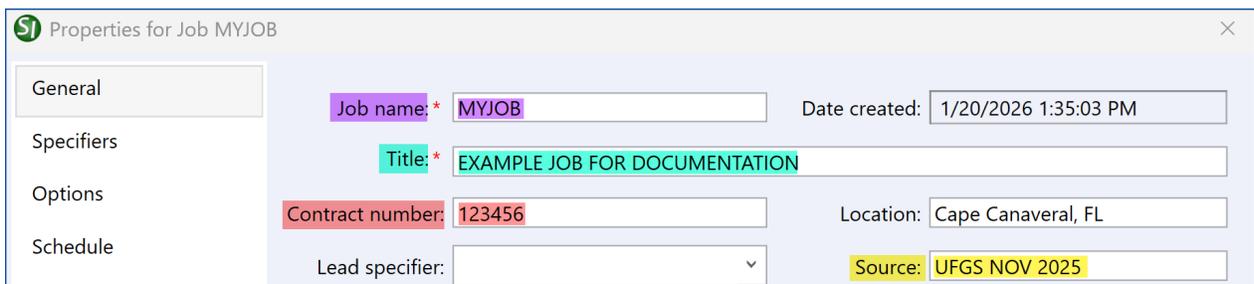
- **Header and Footer**: These fields are listed under the **Variables** pane of the **Header/Footer** tab. You can also insert page and Section Numbers in a selected Header or Footer field.
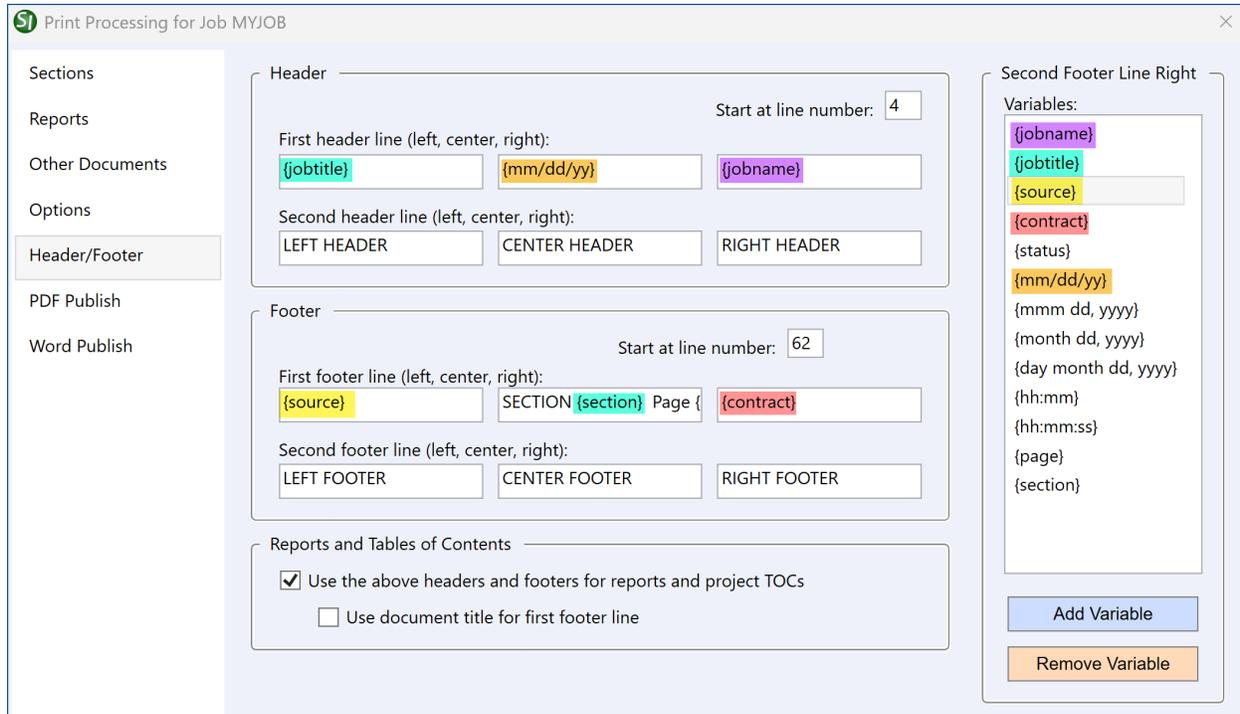
To add a variable or enter text of your own in the Header or Footer, simply click in the location field you want the text to appear. Next either enter text or click on a variable to grab from the **Properties of Job** window, then click the **Add Variable** button to insert it. You can also mix typed text and variables, as shown in the first line of the Footer in the above screenshot where the word SECTION is typed and the variable to grab the applicable Section Number **{section}** is inserted right after, then the word Page is typed and the variable for the Page Number **{page}** is inserted directly after it.

The Header and Footer variables inserted and typed in as shown above appear as follows when the Section is printed to PDF or Word.

HEADER

The variable **{jobname}** grabbed the name of this training Job: **MYJOB** (this will be whatever your actual Job name is).

FOOTER

UFGS NOV 2025	SECTION 01 78 23 Page 1	123456
LEFT FOOTER	CENTER FOOTER	RIGHT FOOTER

The **{section}** variable grabbed the applicable Section Number (01 78 23) and inserted it. The **{page}** variable inserted the applicable page number on each page of the Section. Also note how other variables were grabbed from the **Properties for Job** window and the appropriate information was inserted in the Header and Footer in the format of the selected variable (e.g., 02/04/26 **{mm/dd/yy}** in the Header Center field, UFGS NOV 2025 **{source}** in the Lower Left Footer field, and the 123456 **{contract}** information in the Lower Right footer field).

- **Reports and Table of Contents**: The same Header and Footer text can be applied to Reports and TOC files by checking that option under this section on the bottom of the **Header/Footer** tab:

- o   With only the **Use the above headers and footers for reports and project TOCs** option checked, all the Header and Footer information selected above will be applied to those files with the Document file name inserted in lieu of a Section Number.

- o   The second option **Use document title for first footer line** is only available if the first option is selected. This option will then use the report or TOC name in lieu of the Footer fields and will ignore the Left and Right Footer fields. The second Footer line remains the same.

  For additional guidance, watch the **Header/Footer Tab** eLearning module within **Chapter 4 – Process and Print/Publish.**

Print Processing – PDF Publish Tab

There are many options available on the **PDF Publish** tab when you opt to publish your Section(s) to PDF.

Section PDF files are generated from the processed .PRN versions of each Section rather than the original .SEC files. During the Reconciliation processes, the software duplicates the .SEC files into a .PRN format to apply automated changes based on your Job Section edits. Consequently, only the .PRN files contain the final, reconciled data required for an accurate

PDF. If you open the .SEC file, it will still be intact as you last saved it. For example, all References will still be listed in the Reference Article even if some were stripped out for non-use in the .PRN/PDF version of the Section.

- **Publish to PDF**: First you must check this option. No other options will be available for selection unless you check this.

  (i) Even if this top option is checked, some of the options are still grayed out depending on what additional options you select.
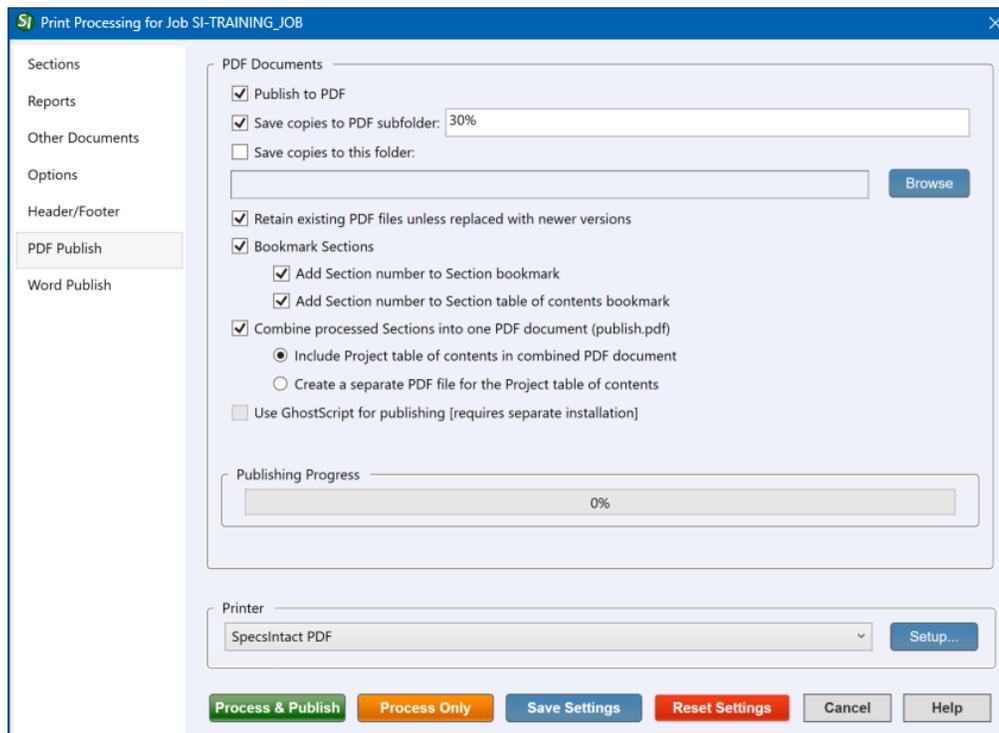
- **Save copies to PDF subfolder**: This option is only available when printing a Job and allows you to process a set of PDF documents that correspond to the **Review Status/Amendment Level** chosen from the **Schedule Tab** of the **Properties for Job** window (shown below) and saved in a separate folder with that review status folder name under the **PDF Files** folder.

- **Save copies to this folder**: When publishing to PDF, you can browse and save copies of the PDF documents to an alternative location outside of the Working Directory. This option can be used to promote team collaboration while also publishing and leaving the original PDF documents in their default location within the **SpecsIntact** Working Directory.

> ❗ This 'browsed to' folder location is temporary and <u>will not</u> be retained or saved, even if you click the **Save Settings** button.

- **Retain existing PDF files unless replaced with newer versions:** This option prevents the system from automatically deleting all existing PDF files in the destination folder or subfolder when new PDF files are generated. Any existing PDF files in the folder or subfolder that have the same names as ones being generated will be replaced with the newly generated files unless this option is selected.

- **Bookmark Sections**: This option creates bookmarks in TOC format in the PDF of the Sections, with an expandable outline that contains links to the Parts and Subparts that allows you to quickly jump to whichever one you click on just as in the **SI Editor's Navigator**.
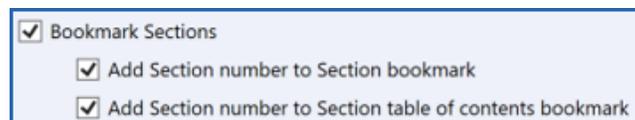
- **Add Section number to Section bookmark:** This option will add the Section Number to the Section bookmarks.

- **Add Section number to Section table of contents bookmark:** This option is only available when either of the **Section Table of Contents** options (with or without scope) on the **Reports** tab of the **Print Processing** window is selected:
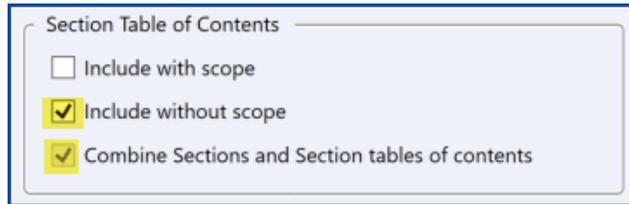
ⓘ If neither of the **Section Table of Contents** options from the **Reports** tab shown above is checked, this option will be grayed out on the **PDF Publish** tab.

- **Combine processed Sections into one PDF document (publish.pdf)**: This option creates one PDF document containing your entire Job or selected Sections. If you have selected the **Project Table of Contents** from the **Reports** tab, you will have the two following options shown below:
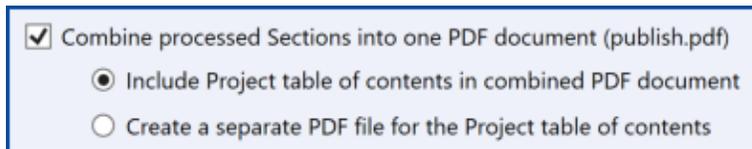

- o **Include Project table of contents in combined PDF document:** This option will add the Project Table of Contents (with or without scope, as selected on the **Reports** tab) as the first page(s) in front of all the specification Sections in one large, combined PDF document (PUBLISH.PDF).
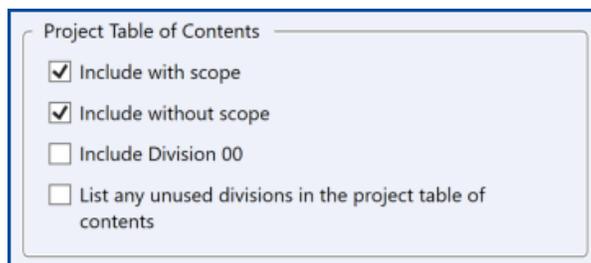
- o **Create a separate PDF file for the Project table of contents:** This option will create a separate Project Table of Contents (with or without scope, as selected on the **Reports** tab shown on the screenshot above).

  1. If the **Include with scope** option is selected, the file name generated will be PROJSCP.PDF.

  2. If the **Include without scope** option is selected, the file name generated will be PROJECT.PDF.
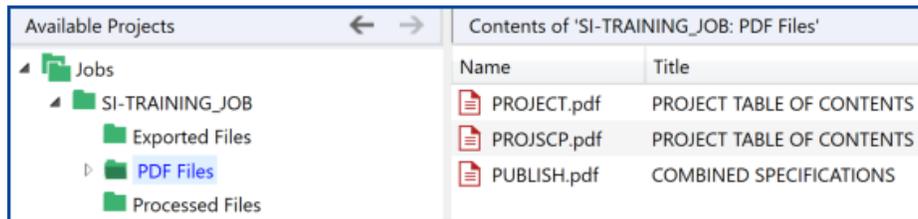
- **Use GhostScript for publishing [requires separate installation]**: **SpecsIntact** fully supports GhostScript as a third alternative for publishing to PDF. As noted, a separate installation is required for GPL GhostScript. If it is not installed, this option is grayed out. Additionally, the **SpecsIntact PDF printer** must be installed and selected to publish using GhostScript.

Once the PDF Section(s) have been published they are accessible under the applicable **PDF Files** folder or alternate selected PDF folder:
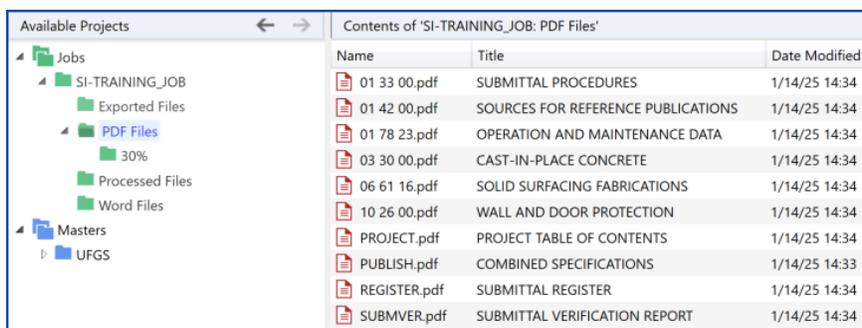
❗ There is NO way to bring a PDF Section back into **SpecsIntact**, even if the PDF file was originally created in **SpecsIntact**.

🎞 For additional guidance, watch the **PDF Publish Tab** eLearning module within **Chapter 4 – Process and Print/Publish.**

Print Processing – Word Publish Tab

SpecsIntact provides an option to publish your Sections to Microsoft Word from the **Word Publish** tab.

- **Publish Sections to Word**: Section files will be published with all your previously selected options from the other tabs.
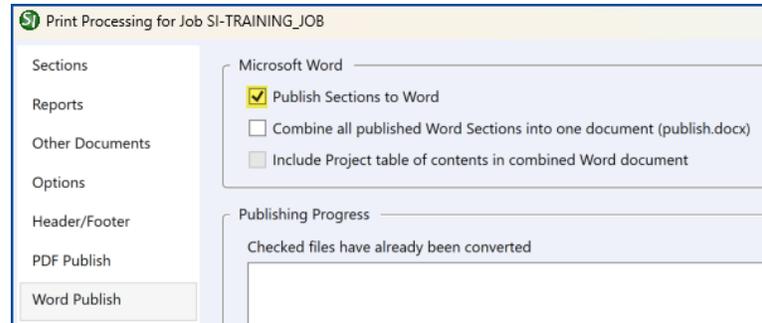
(i) **SpecsIntact** converts Sections first to **PDF** format. Those files are then converted to **Word** files. This information is noted in a popup window as soon as you click on the **Word Publish** tab.
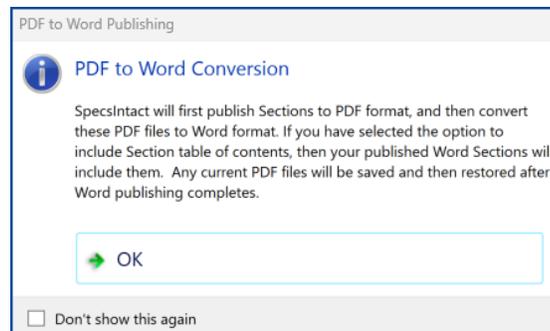
💡 If in the future you do not want to see this popup again, you can place a check in the **Don't show this again** checkbox.

1. *Click* **OK** to open the **Word Publish** tab and then *place* a check in the **Publish Sections to Word** option to proceed with the conversion of Sections from PDF to Word.

2. *Click* the **Process & Publish** button. The software begins processing the Job Sections and then switches over to the **PDF Publish** tab and begins to convert your Section files to PDF files based on the pre-selected options:
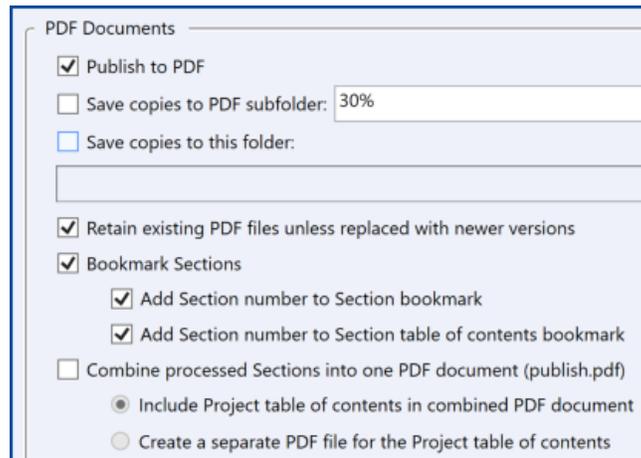
Publishing Process

1. Once the PDF files are generated, the system flips back to the **Word Publish** tab.

2. The bottom pane of the **Word Publish** tab displays a list of the converted PDF files and immediately starts to convert those to Word format. The files are checked off as they are converted. The green status bar shows the progress of this final conversion process:
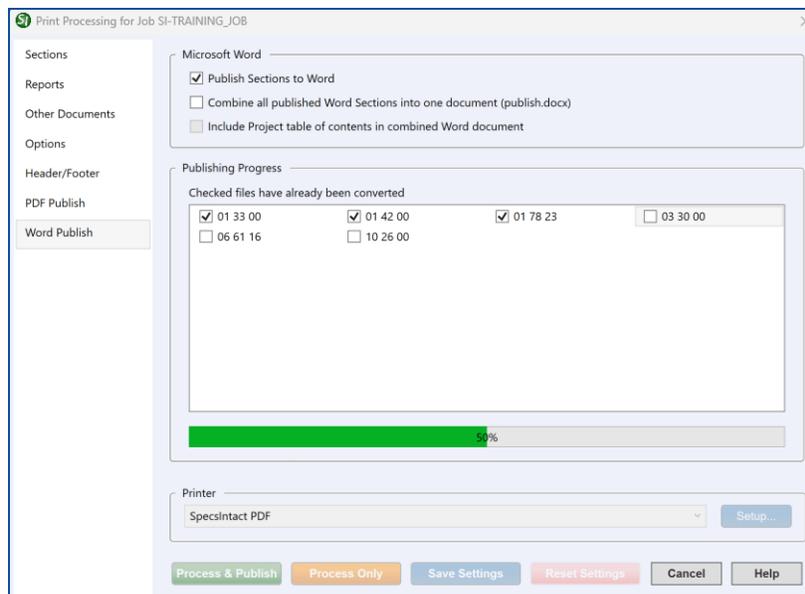
3. Once the Word files have been published, the newly converted Word files are accessible under the **Word Files** folder under the Job name.

! There is <u>NO</u> way to convert a Section from Word back to **SpecsIntact**, even if the Word file was originally created using this process.

🎞 For additional guidance, watch the **Word Publish Tab** <u>eLearning</u> module within **Chapter 4 – Process and Print/Publish.**

You should now be familiar with how to navigate all the tabs and options in the **Print Processing** window and be able to find the processed and published files and know the difference between them.

Cleaning Up SpecsIntact Reports

All the available **SpecsIntact** reports were identified in the Print Processing – Reports Tab topic in this guide. This topic will cover how to open, read and correct the discrepancies or errors identified on those reports.

All **SpecsIntact** reports are generated with an .RPT file extension and are placed in the **Processed Files** folder.

1. Viewing and fixing any errors or discrepancies on the **SI** reports is simple. Just *double-click* any report file (e.g., SECTVER.RPT) to open it. The **Section Verification Report** is shown as an example below:

2. Once the report is open, you can review all discrepancies identified during report generation, including their specific Section and Subpart locations. To navigate directly to an issue,

double-click the Section Number on any line item; **SpecsIntact** will open the relevant Section and position the cursor at the exact location identified in the report.

```
<SPT =1.4.2.1>1.4.2.1    <TTL>Designer of Record Approved (DA)</TTL>

  <TXT>The Government may review any or all Designer of Record approved submittals
  for conformance with the Solicitation, the Accepted Proposal, and the
  completed design.  The Government will review all submittals designated as
  varying from the Solicitation or Accepted Proposal, as described below.
  Provide design submittals in accordance with Section <SRF>01 33 16.00 10</SRF> DESIGN
  DATA (DESIGN AFTER AWARD).  Generally, list design submittals under SD-05
  Design Data.</TXT>
```

This method allows you to quickly correct the Section containing the discrepancy, save the Section, close it, and move on to the next one.

💡 When a Section is double-clicked and opened from a report, the report remains active in the background of the **SI Editor**. By using the smaller 'x' to close only the current Section - rather than the main application (larger) 'X' - you can easily return to the report and move on to the next item.

Address Reconciliation and Verification Report

The UFGS Section 01 42 00 Sources for Reference Publications (Address Section) is the key to the Address Reconciliation process, and the address verification information is reported on the **Address Verification Report**.

Address Reconciliation Process

As mentioned earlier in this guide, all the Reference Organizations that are used throughout the whole **UFGS Master** are listed in Section 01 42 00 Sources for Reference Publications (Address Section). The purpose of running the Address Reconciliation process is for this Address Section to end up only listing the Organizations that are being used in the current Job. This is what the Address Reconciliation

process does. It scans every Section in your Job and strips out any organization information that wasn't used in any of your project Sections.

There are a couple of things to know to get the correct results out of this process:

a. When you go to print/publish your Job, **All Sections** is selected by default, unless you had a single or set of Sections selected when you open this window. Additionally, the **Addresses**, **References**, and **Submittals** options under the **Reconcile** section of this window are also selected as shown below:

b. If the **Addresses** option is not selected, the Address Reconciliation process will not run, and the entire 01 42 00 Address Section will be printed.

✋ NEVER delete Reference Organizations from the 01 42 00 Address Section. This is done automatically based on the Section edits made in the entire Job when the Reference and Address Reconciliation processes are run.

Address Verification Report

It is very important to make sure that any newly added Reference Organization is already present in the 01 42 00 Address Section of your Job. If not, it must be added. Most Reference Organizations are already included in this Section, but on the occasion a new Organization needs to be added, it is imperative to have the most up-to-date and complete information.

To verify that there are no missing addresses from the 01 42 00 Address Section, you should run the **Address Verification Report** on the Job.

Cleaning Up the Address Verification Report

When an address is missing from the 01 42 00 Address Section, the **Address Verification Report** will tell you the exact Reference Organization that is missing and what Section it was found in as shown below.

> Note the HINT on the report informs you that you can *double-click* on the Section Number to *open* that Section. Additionally, it will take you directly to the place in the Section where the unverified Reference Organization is located so you can verify it.

```
                ADDRESS VERIFICATION REPORT

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

HINT: With this file opened as a report from the SI Processed Files folder,
double-clicking a Section number will open the Section in the Editor.
==================================================================

SECTION          REFERENCE ORGANIZATION

06 61 16         CSA GROUP (CSA)
```

If you feel the information in the report is incorrect and that this organization's address is in fact already included in the 01 42 00 Address Section, you should open that Section and search for that organization. If you do find the applicable organization, it is likely that it is just a keying error when you inserted it in the Reference Article of that Section. Remember, if the information within the ORG tags in the Section does not <u>EXACTLY</u> match what is in the 01 42 00 Address Section, **SpecsIntact** will not consider them a match and will include them in this report. To remedy this, simply copy the organization name <ORG>CSA GROUP (CSA)</ORG> from the 01 42 00 Address Section and paste it inside that organization's ORG tags in the actual Section. Save the Section and run the report again to verify it is now a match.

```
</REF><REF><ORG>CSA GROUP (CSA)</ORG>
        <OAD>178 Rexdale Blvd.
Toronto, ON, Canada M9W 1R3
Ph:    416-747-4044
Fax:   416-747-2510
E-mail:  member@csagroup.org
Internet:  <URL HREF=https://www.csagroup.org>https://www.csagroup.org/</URL></OAD>
```

If the organization is really missing from the 01 42 00 Address Section, it would need to be added to the Section, including all its applicable information within the correct REF, ORG, and OAD tags.

To add a new Reference Organization Address to the Address Section, double-click on the 01 42 00 Address Section to open it. Copying and pasting an existing Reference Organization and using it as a template for the new Reference Organization is the most efficient way to insert it.

1. First, scroll down to where the new Reference Organization should be inserted (in alphabetical order - by name, not acronym). Then copy the organization above or below where you want to insert the new one and *highlight* the whole organization including both the beginning and ending REF tags as shown below:

```
</REF><REF><ORG>CSA GROUP (CSA)</ORG>
        <OAD>178 Rexdale Blvd.
        Toronto, ON, Canada M9W 1R3
        Ph:   416-747-4044
        Fax:  416-747-2510
        E-mail:  member@csagroup.org
        Internet:   <URL HREF=https://www.csagroup.org>https://www.csagroup.org/</URL></OAD>

</REF><REF><ORG>DEPARTMENT OF DEFENSE EXPLOSIVES SAFETY BOARD (DDESB)</ORG>
        <OAD>Internet:   <URL HREF=https://denix.osd.mil/ddes/home>https://denix.osd.mil/ddes/hor
```

2. Use your preferred method to *copy* the highlighted tags and text, then *place* your cursor after the ending </REF> tag of the organization above where you want to insert your new organization and *paste* it there.

3. Lastly since it's being used as a template, *type* in the new information over top of the copied information, within the applicable tags:

```
</REF>|<REF><ORG>ORGANIZATION NAME</ORG>
        <OAD>Organization Street Address
        City, ST  Zip Code
        Ph:
        Fax:
        E-mail:
        Internet:</OAD>
</REF><REF>
```

4. Repeat steps above for each new Reference Organization that needs to be added.
5. *Click* **Save** then **Close**.
6. Re-run the **Address Verification Report** to verify the report is now clear.

Additional information on Reference Addresses can be found under the Section 01 42 00 (Address Section) topic in this guide.

For additional guidance, watch the **Address Verification Report** eLearning module within **Chapter 6 – Correcting QA Report Errors and Discrepancies.**

Reference Reconciliation and Verification Report

The Reference Reconciliation function automates the maintenance of the Reference Article in each Job Section. During this process, the software removes Reference Identifiers (RIDs) from the Reference Article that are no longer cited due to Section edits, ensuring the reference list in the .PRN file remains concise and accurate. If a RID is deleted from the text, the software automatically removes the corresponding entry from the Reference Article. Conversely, while the Reference Reconciliation process handles RID removals, the **Reference Verification Report** identifies any missing RIDs that need to be added to the Reference Article.

> ❗ The Reference Reconciliation process runs on each individual Section within a Job and removes unused RIDs from each Section. This is different from both the Address Reconciliation and Submittal Reconciliation processes. Those functions scan all the Sections in a Job and then remove unused elements (Addresses or Submittals) from the applicable 01 42 00 Address Section or the 01 33 00 Submittal Procedures Section, respectively.

Reference Reconciliation Process

The Reference Reconciliation process eliminates the need to manually delete any Reference standards from the Reference Article of any Section in a Job by removing any deleted (edited out) References Identifiers (RIDs) automatically.

> ℹ️ The Reference Reconciliation process occurs during the print/publish cycle. These changes are applied exclusively to the output versions of the Sections (.PRN, .DOC, and .PDF) and do not modify the source .SEC files. Consequently, opening a .SEC file will still reveal the original RIDs, even after reconciliation has been performed.

> ✋ NEVER manually delete Reference Identifiers from Reference Article of any Section in a Job. This is wasted effort since **SpecsIntact** will strip out any unused ones during the Reference Reconciliation process for you.

Reference Verification Report

Reference Identifier (RID) tags must be placed around every Reference ID and tagged in the Section's text outside the '1.x REFERENCES' Article as well as be included inside the Reference Article. The **Reference Verification Report** verifies that this is true and if there are RIDs in the Section text missing

from the Reference Article. If the RID (e.g., ASTM E2166) is not there, it will be listed as an **Unresolved Reference** on this report.

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

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

  <REF>    <ORG>ASTM INTERNATIONAL (ASTM)</ORG>

  <RID>ASTM E2166</RID>                 <RTL>(2016; R 2023) Standard Practice for
                                        Organizing and Managing Building Data</RTL>

  </REF><REF><ORG>U.S. DEPARTMENT OF DEFENSE (DOD)</ORG>

  <RID>FC 1-300-09N</RID>               <RTL>(2014; with Change 6, 2021) Navy and
                                        Marine Corps Design</RTL>

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

ⓘ The **Reference Verification Report** generates two separate files: the primary **Reference Verification Report** (REFVER.RPT) and the **Reference Title Report** (TTLDIFFS.RPT). To resolve project discrepancies or errors, you should focus specifically on the REFVER.RPT file.

Cleaning Up the Reference Verification Report

Double-click on the **Reference Verification Report** (REFVER.RPT) to open it. If no issues were found in any Section, the report will note ALL REFERENCES HAVE BEEN VERIFIED.

The **Unresolved References** portion of this report lists RIDs that you've added in your text but forgot to include in your Reference Article. You'll need to add these back into the Reference Article using the Reference ID (RID) and Reference Title (RTL) tags, making sure to include the title and the date.

ⓘ Note the HINT on the report informs you that you can *double-click* on the Section Number to *open* that Section. Additionally, it will take you directly to the place in the Section where the unverified Reference ID is located so you verify it and then *add* it to the Reference Article as necessary.

```
                    REFERENCE VERIFICATION REPORT

                        Unresolved References

==============================================================================
This report lists all References that appear in a Section, but that are not
listed in either that Section's Reference Article or the Supplemental
Reference List.

HINT: With this file opened as a report from the SI Processed Files folder,
double-clicking a Section number will open the Section in the Editor.
==============================================================================

SECTION          SUBPART           REFERENCE

06 61 16         2.1.2             ASTM D638

06 61 16         2.1.3             ASTM D638



                         Unused References

==============================================================================
The following References were in the Section Reference Article, but were
not used elsewhere in the text.

HINT: With this file opened as a report from the SI Processed Files folder,
double-clicking a Section number will open the Section in the Editor.
==============================================================================

SECTION          SUBPART    REFERENCE          REFERENCE TITLE

06 61 16         1.1        ASTM D696          (2016) Standard Test
                                               Method for Coefficient of
                                               Linear Thermal Expansion
                                               of Plastics Between -30
                                               degrees C and 30 degrees
                                               C With a Vitreous Silica
                                               Dilatometer

06 61 16         1.1        FAC 6A-10.040      Basic Skills Requirements
                                               for Postsecondary Career
                                               Certificate Education
```

 Additional information on inserting Reference IDs and Addresses in a Section can be found under the Reference Wizard topic in this guide.

Reference Verification Report (Lower Section)

The lower portion of the **Reference Verification Report** lists any **Unused References.** However, this portion of the report only gets populated if the **References** checkbox option under the **Reconcile** section in the **Print Processing** window is <u>not</u> checked when you process the report. <u>NOTE</u>: All reconciliation processes are checked by default here.

Select Sections
- ◉ All Sections
- ○ Some Sections

Printing and Renumbering
- ☑ Print/Process Sections
- ☑ Renumber paragraphs

Reconcile
- ☑ Addresses
- ☐ References
- ☑ Submittals

Any References listed on the second part of the **Reference Verification Report** do not indicate a problem in the Job. It is for information only as it just lists unused References that were likely in paragraphs that were purposely edited out.

For additional guidance, watch the **Reference Verification Report** eLearning module within **Chapter 6 – Correcting QA Report Errors and Discrepancies.**

Submittal Reconciliation and Verification Report

The Submittal Reconciliation function is processed during the print/publish phase of the project to remove any unused Submittal Descriptions (SD-01 through SD-11) from the 01 33 00 Submittal Procedures Section of your Job. Once that process finishes, the **Submittal Verification Report** identifies any mis-matched Submittals within each Job Section.

Submittal Reconciliation Process

The Submittal Reconciliation process is the third and final Reconciliation Process in **SpecsIntact**. This process compares the Submittal Descriptions used in each of the project Sections in the Job to the eleven (11) standard Submittal Descriptions listed in the '1.2.1 Quantity of Submittals' sub-paragraph of the 01 33 00 Submittals Procedures Section in the Job. The only valid Submittal Descriptions are listed below:

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

When Submittal Reconciliation is run on the Job, any of the SD-01 through SD-11 Submittal Descriptions that were <u>NOT</u> used in the Job, are stripped from the '1.2.1 Quantity of Submittals' subpart of the 01 33 00 Submittals Procedures Section leaving only the Submittal Descriptions that were cited in the Job.

The Submittal Reconciliation process is run on the Job during the print/publish process. This is why the Submittal Reconciliation process changes only appear in the output versions of Section 01 33 00 Submittal Procedures (.PRN, .DOC and .PDF), NOT in the original .SEC files.

Therefore, when the .SEC version of Section 01 33 00 is opened, all the original SD-01 through SD-11 Submittal Descriptions will still be there.

✋ The Submittal Reconciliation process eliminates the need to manually delete any Submittals Descriptions from the Section 01 33 00 Submittal Procedures.

Submittal Verification Report

To verify that there are no missing or unverified Submittal Descriptions (SD-) or Submittal Items, you should always run the **Submittal Verification Report** on your Section. This report will give you an error if a Submittal Description noted in a Section is not found in the 01 33 00 Submittal Procedures Section. It will also alert you if you have used a Submittal Item in the Submittal Article of the Section, but it is not found elsewhere in the text of the Section and vice versa – as this is a standard requirement.

Once processed, the **Submittal Verification Report** will be located under the Job's **Processed Files** folder. The report file's name is 'SUBMVER.RPT'. Double-click to open and view the report. There are two parts to this report: (1) **Section Submittal Discrepancies** and (2) **Discrepancies Between Submittal Articles and Submittal Procedures Section**. Both are explained in detail within this topic.

Cleaning Up the Submittal Verification Report

Double-click on the **Submittal Verification Report** (SUBMVER.RPT) to open it. If no issues were found in any Section, the report will note ALL SUBMITTALS HAVE BEEN VERIFIED.

Section Submittal Discrepancies

The top portion of the **Submittal Verification Report** focuses on **Section Submittal Discrepancies** in each Section and lists any Submittal Items that do not match up within a Section. If there are no discrepancies, this part of the report will be blank.

If there are discrepancies, they will be listed as shown in the example below:

> ℹ️ Note the HINT on the report informs you that you can *double-click* on the Section Number to *open* that Section. Additionally, it will take you directly to the place in the Section where the unverified Submittal Item is located so you verify it and address it as necessary.

> ❗ Pay close attention to the <mark>highlighted</mark> wording above on this part of the report!

- **Submittal was not found <mark><u>in</u></mark> the Submittal Article:**

  The first error is telling you that the Submittal Item – Training Video Recording - was not found <mark><u>in</u></mark> the Submittal Article. This means that it is noted in Subpart 3.1.4 of the Section, but it is <u>NOT</u> listed in the Submittal Article as it is required to be. To correct this discrepancy, either the Submittal Item must be deleted from Subpart 3.1.4, or it must be added under the applicable SD-XX Submittal Description in the Submittal Article. Either of these options will clear up this error.

- **Submittal was not found <mark><u>outside</u></mark> the Submittal Article:**

  The second error is indicating the exact opposite is true for this Submittal Item – Record Drawings and Utility Systems. This instance is to inform you that this Submittal Item was not found <mark><u>outside</u></mark> the Submittal Article. This means it is listed in the Submittal Article, but it is not noted anywhere else in the Section, as is required. In this case, it should either be deleted from the Submittal

Article (if it is not needed), found and tagged as a Submittal (if it is needed), or added elsewhere in the text (if it is needed).

❗ In summary, if you have a Submittal Item listed in the Submittal Article, then it must be addressed somewhere else in the Section - and vice versa!

ⓘ Additional information on inserting Submittal Descriptions and Items in a Section can be found under the Submittal Wizard topic in this guide.

Discrepancies Between Submittal Articles and Submittal Procedures Section

The bottom portion of the **Submittal Verification Report** focuses on **Discrepancies Between Submittal Articles and Submittal Procedures Section**. This part of the report lets you know if a Submittal Description that is listed in the Submittal Article of the Section does NOT match any of the standard eleven Submittal Descriptions (SD-01 through SD-11) in the 01 33 00 Submittals Procedures Section. If an inserted one is not found, it is listed in this part of the report. If there are no discrepancies, this part of the report will be blank.

```
Discrepancies Between Submittal Articles and Submittal Procedures Section

===================================================================
Submittal Descriptions from Section Submittal Articles that differ from
Descriptions in the Submittal Procedures Section (01 33 00, 01330, or
01300), or that are missing from the Submittal Procedures Section:

HINT: With this file opened as a report from the SI Processed Files folder,
double-clicking a Section number will open the Section in the Editor.
===================================================================

STANDARD DESCRIPTION
SECTION          SUBPART      INVALID DESCRIPTION
No Standard Submittal Description for SD-12 was found

01 78 23         1.2          SD-12 Closeout Submittals
```

To clear up any discrepancies in this report, you must edit the Submittal Description to exactly match one of the standard Submittal Descriptions (SD-01 through SD-11). In this example, 'SD-12 Closeout Submittals' should be corrected to 'SD-11 Closeout Submittals'.

ⓘ Additional information on valid Submittal Descriptions can be found in the chart under the Submittal Reconciliation Process topic in this guide.

🎞 For additional guidance, watch the **Submittal Verification Report** eLearning module within **Chapter 6 – Correcting QA Report Errors and Discrepancies.**

Section Verification Report

The **Section Verification Report** aids in alerting you if a **UFGS Master** Section is cited in the text of one or more of your project Sections but it is NOT included in your Job. This report helps to ensure that nothing is missing in your project that might be important to include from another **UFGS Master** Section.

Here is an example of a Section Reference from within UFGS Section 01 78 00:

Section 01 78 00 Closeout Submittals is referenced (cited) in Subpart 1.6.2.1 of Section 01 78 23, but it is not included in our project.

ⓘ There are SRF tags surrounding all the Section Numbers within a specification Section. This is how **SpecsIntact** can report any discrepancies when the **Section Verification Report** is generated when the Job is print/published. This is why it's important when inserting a new Section Reference into a paragraph that you insert the Section Number exactly as it should be formatted and insert SRF tags around it.

Cleaning Up the Section Verification Report

To clean up the **Section Verification Report** you first need to determine whether the Section that is being cited/referenced really has information that directly pertains to this project and whether it needs to be added to the Job. This is something the specifier will have to determine. Which direction is decided upon determines how the Section Reference discrepancies will be resolved and therefore be removed from the **Section Verification Report**. Here is an example of this report:

```
                    SECTION VERIFICATION REPORT

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

HINT: With this file opened as a report from the SI Processed Files folder,
double-clicking a Section number will open the Section in the Editor.
============================================================================

SECTION            SUBPART            SECTION REFERENCED

01 33 00           1.4.2.1            01 33 16.00 10
01 33 00           1.4.2.2            01 33 16.00 10
01 33 00           1.4.2.2            01 33 16.00 10
01 33 00           1.4.4              01 33 29
01 33 00           1.5.2              01 91 00.15
01 33 00           1.5.2              23 09 00
01 33 00           1.5.2              23 09 53.00 20
01 33 00           1.5.2              23 05 93
01 33 00           1.5.2              23 08 01.00 20
01 33 00           1.5.2              26 12 19
01 33 00           1.5.2              26 12 21
01 33 00           1.5.2              33 71 01
01 33 00           1.5.2              26 11 16
01 33 00           1.5.2              26 11 13.00 20
01 33 00           1.9.1              01 45 00.15 10
01 33 00           1.11.4             01 33 16.00 10
01 78 23           1.3.4              01 30 00
01 78 23           1.4               01 78 24.00 10
01 78 23           1.4               01 78 24.00 20
01 78 23           1.6.2.1            01 78 00
01 78 23           1.6.4.1            01 35 26
01 78 23           1.6.6.5            01 78 00
01 78 23           1.6.6.6            01 78 00
01 78 23           1.6.6.7            01 78 00
01 78 23           3.1                01 78 00
01 78 23           3.1.7              01 45 00
03 30 00           1.8.1              01 33 29
03 30 00           2.1.1              06 10 00
```

Note the Section Reference we pointed out at the beginning of this topic is highlighted above. Within Section 01 78 23 that is included in this Job, Section 01 78 00 is cited/referenced in paragraph 1.6.2.1. This report points out that we have referenced it, but that it is not included in our Job.

> ℹ️ Note the HINT on the report informs you that you can *double-click* on the Section Number to *open* that Section. Additionally, it will take you directly to the place in the Section where the unverified Section Reference is located so you verify it and address it as necessary.

- Option 1: Keep the Section Reference in the sentence it is cited in.

  Solution: Add the Section to the Job. This will resolve the discrepancy and remove that instance from the report.

> ❗ CAUTION: Before adding the Sections listed in this report to your Job, consider the potential impact on your project scope. Each added Section likely contains its own references to additional Sections. Adding them without verification may cause the list of missing Sections to expand rather than decrease.

- Option 2: Delete the sentence the Section Reference is referenced in.

   Solution: This will resolve the discrepancy and remove that instance from the report.

- Option 3: Change the Section Reference in the paragraph to reference an applicable Section that is already contained in the Job.

   Solution: This will resolve the discrepancy and remove it from the report.

For additional guidance, watch the **Section Verification Report** eLearning module within **Chapter 6 – Correcting QA Report Errors and Discrepancies.**

SpecsIntact Automated Editing Functions

Unlike standard word processing programs, the **SI Editor** features automated tools and wizards that ensure the accurate insertion of References, Submittals, and Section References. These tools automatically insert the required elements and apply the correct tags, saving you the time and effort of manual formatting.

SI Editor's Reference Tool and Wizard

Within the **SI Editor** there are two very helpful functions available to assist you in both checking that you have the most up to date References as well as assisting with accurately inserting new or updated ones.

> Both these Reference tools, by default, utilize the **Unified Master Reference List (UMRL)** from the **UFGS Master** you have connected. They scan it to find and compare Reference Organizations (ORGs), Reference Identifiers (RIDs), and Reference Titles (RTLs) within your Section to those in the **UMRL**.

> Considering the above information, it is very important to always update your system to the latest released version of the **Unified Master Reference List (UMRL)**.

Manage your References with precision using these dynamic **SI Editor** tools:

- **Check Reference**: Boosts productivity by making it easy to update existing References and alerting you to any that are missing and then offering to insert them for you providing they are found in the **Unified Master Reference List (UMRL)**.

- **Reference Wizard**: Extends the capabilities of the **Check Reference** tool by automating the insertion of new References with the correct formatting and tags.

> To learn more about the **SI Editor's Reference Tool and Wizard**, refer to the Check Reference and Reference Wizard topics in the Web-Based Help**.**

Check Reference Tool

The **Check Reference** tool is a quick and easy way to compare the References within your Section to those in the **UMRL**. Use the **Check Reference** tool to check whether an existing or added Reference

Identifier (RID) is up to date in the Reference Article. In the text, use this tool to check if it is also included in the Reference Article as required.

To activate the **Check Reference** tool, whether it be in the Reference Article or anywhere in the Section text, simply place your cursor anywhere inside a pair of Reference ID (RID) tags, (e.g., <RID>ASTM|E1971</RID>) right-click and select the **Check Reference** menu option. If it is the latest Reference (according to the matching Reference in the **UMRL**) the following message pops up:
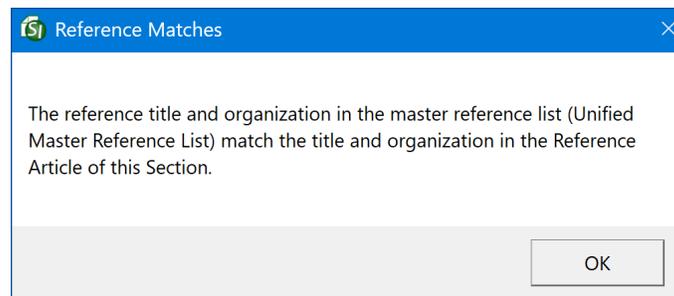
If it is not a match to the latest Reference in the **UMRL**, then a window pops containing the difference in the Reference Titles between the RID in the current Section and the information in the **UMRL**. See example below:
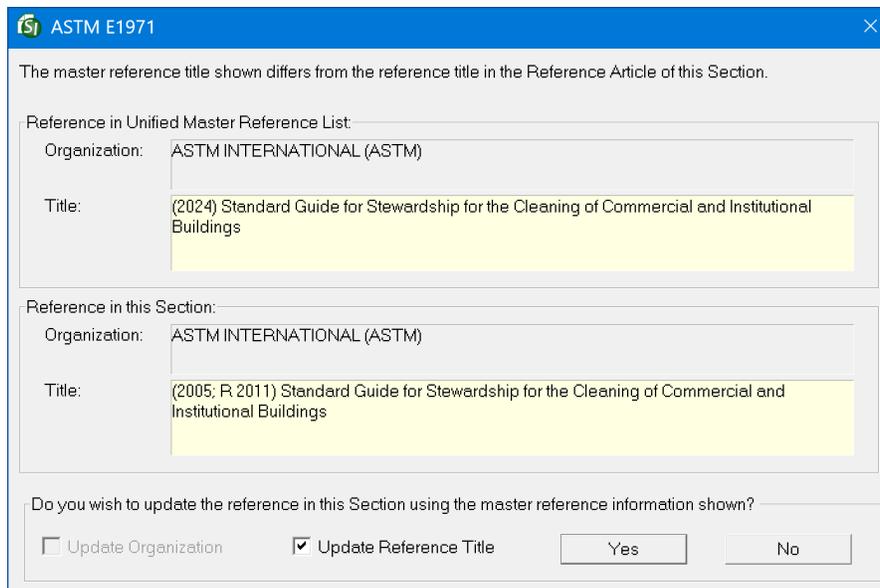
The **UMRL** Reference details are listed first, then the Reference in the Section, giving you a view of the difference between the two. By default, the **Update Reference Title** box is checked. To update the

Reference information to match the information in the **UMRL**, click **Yes** and it will be updated. To leave it as is, click **No**.

Identify and Add Missing References with Check Reference Tool

If you use the **Check Reference** tool to check a Reference in the text, and that Reference is missing from the Reference Article, you will be notified it is missing, and prompted to add it:
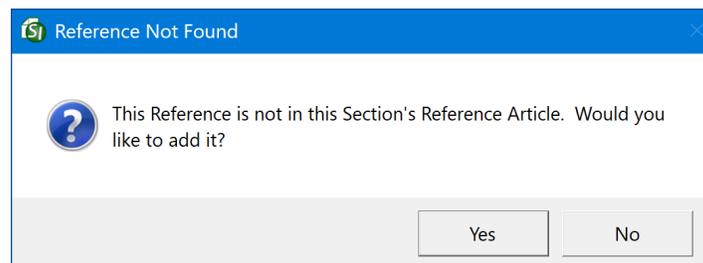
If you click **Yes**, it will add the complete <RID>REFERENCE ID<RID> and <RTL>Date and Title</RTL> under the applicable Reference Organization and confirm it. Once you click **OK**, you can see where it inserted the Reference.
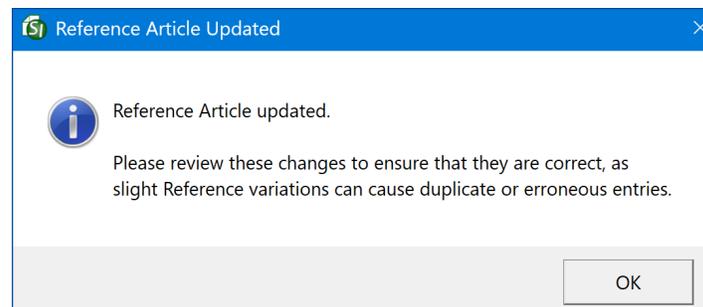

```
</REF><REF><ORG>ASTM INTERNATIONAL (ASTM)</ORG>

<ADD><RID>ASTM E1971</RID>        <RTL>(2024) Standard Guide for Stewardship for
                                  the Cleaning of Commercial and
                                  Institutional Buildings</RTL>

</ADD><RID>ASTM E2166</RID>       <RTL>(2016; R 2023) Standard Practice for
```

❗ The **Check Reference** tool will not, however, tell you if a Reference ID (RID) that is listed in the Reference Article does not have a corresponding RID in the text anywhere. This

information will show up on the [Reference Verification Report](#) which is explained in that topic within this guide.

💡 Hovering over a Reference within the RID tags, whether in the Reference Article or in the text, provides you with a mouse-over hint indicating if the Reference is found in the **UMRL**. If not found, it lets you know that as well. See examples below:

```
<TXT>Provide environmentally friendly cleaning recommendations in accordance
with <RID>ASTM E1971</RID>.</TXT>

/SPT =1.6.7.5.3>  Unified Master Reference List [ORG: ASTM] = (2024) Standard Guide for Stewardship for the Cleaning of Commercial and Institutional Buildings
```

```
Indicate <RID>ASTM A123</RID> location
on or distribution    Reference = NOT FOUND
oles; isolation units such as valves a
```

🎞️ For additional guidance, watch the **Using the Check Reference Feature** [eLearning](#) module within **Chapter 3 – Editing.**

Reference Wizard

Adding a new Reference is made easy with the **SI Editor's Reference Wizard**.

Insert a New Reference in the Reference Article

To activate the **Reference Wizard** to insert a new Reference in the Reference Article, place your cursor where you want to insert the new Reference Identifier (RID) and follow these steps:

1. If the organization is already there, but you need to add an additional Reference Identifier (RID), you'd place your cursor within that organization above or below an existing RID based on the correct alphabetical order as shown below:

```
</REF><REF><ORG>U.S. DEPARTMENT OF DEFENSE (DOD)</ORG>

<RID>FC 1-300-09N</RID>          <RTL>(2014; with Change 6, 2021) Navy and
                                 Marine Corps Design</RTL>

I  ← To insert an additional DOD reference, place cursor on a
      blank line, then click the RID button on the Tagsbar to
      activate the Reference Wizard.
</REF><REF><ORG>SHEET METAL AND AIR CONDITIONING CONTRACTORS' NATIONAL ASSOC

<RID>SMACNA 1858</RID>          <RTL>(2004) HVAC Sound And Vibration Manual
                                 First Edition</RTL>
```

2. Next, *click* the RID button on the **SI Editor's Tagsbar** [REF RID RTL ORG] or go to the **Insert** menu, *select* **Tags**, and find the RID tag and *click* **OK** to activate the **Reference Wizard**:
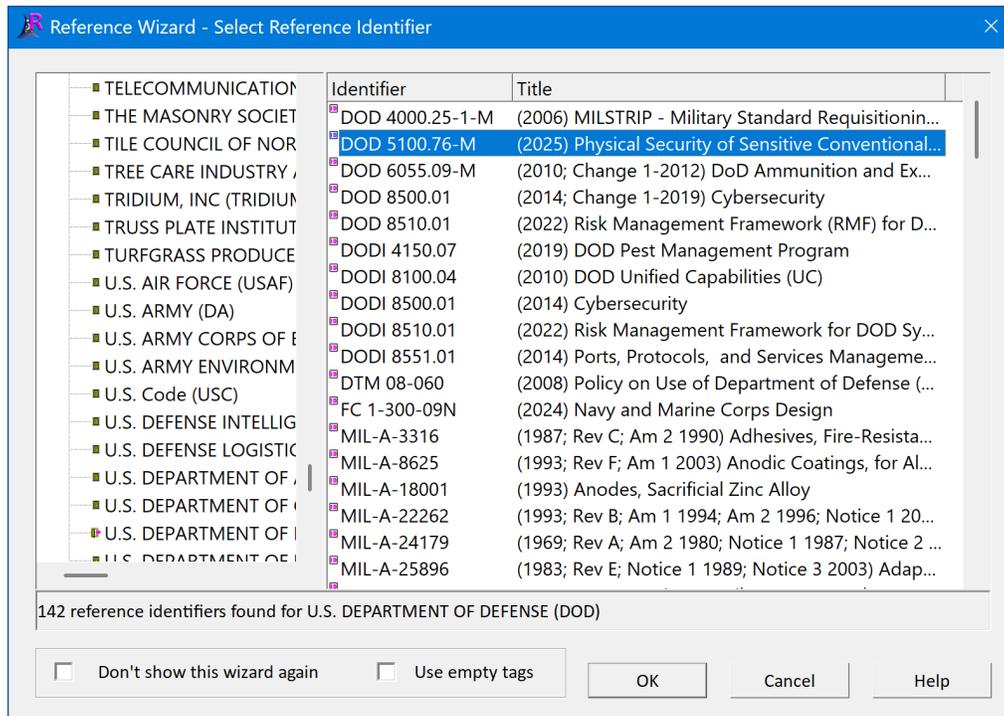
(i) Note that since your cursor was within the DOD Reference Organization when you *clicked* the RID button, the **Reference Wizard** jumped directly to the list of DOD Reference Identifiers (RIDs) that are already listed in the **Unified Master Reference List (UMRL)**. The **UMRL** list is based on what is contained in the **UFGS Master** you have connected to **SpecsIntact**.

3. If the DOD Reference you need to add is already listed, *select* that one and *click* the **OK** button and it is inserted into to the Reference Article as shown below:

```
</REF><REF><ORG>U.S. DEPARTMENT OF DEFENSE (DOD)</ORG>

<RID>FC 1-300-09N</RID>          <RTL>(2014; with Change 6, 2021) Navy and
                                 Marine Corps Design</RTL>

<RID>DOD 5100.76-M</RID>         <RTL>(2025) Physical Security of Sensitive
                                 Conventional Arms, Ammunition, and
                                 Explosives</RTL>

</REF><REF><ORG>SHEET METAL AND AIR CONDITIONING CONTRACTORS' NATIONAL ASSOC
```

4. If, however, the RID you need is not listed, you would need to *place* a check in the **Use empty tags** option, then *click* **OK** to be able to add a new blank one:

| ☐ Don't show this wizard again | ☑ Use empty tags | OK | Cancel | Help |

In this instance, the **Reference Wizard** would insert a Reference Identifier (RID) template, which includes both the necessary RID tags and the Reference Title (RTL) tags. This makes it simple to then manually type in the appropriate RID and RTL information within the applicable tags:

```
</REF><REF><ORG>U.S. DEPARTMENT OF DEFENSE (DOD)</ORG>

<RID>FC 1-300-09N</RID>          <RTL>(2014; with Change 6, 2021) Navy and
                                 Marine Corps Design</RTL>

<RID>[Ref Id]</RID>             <RTL>[Ref Title]</RTL>

</REF><REF><ORG>SHEET METAL AND AIR CONDITIONING CONTRACTORS' NATIONAL ASSOC
```

Insert a New Reference Anywhere in the Section Text

To activate the **Reference Wizard** to insert a new Reference in the Section text, follow these steps:

1. *Place* your cursor where you want to insert a new Reference Identifier (RID).

2. Next, *click* the RID button on the **SI Editor's Tagsbar** `REF RID RTL ORG` or go to the **Insert** menu, *select* **Tags**, and find the RID tag and *click* **OK** to activate the **Reference Wizard**:
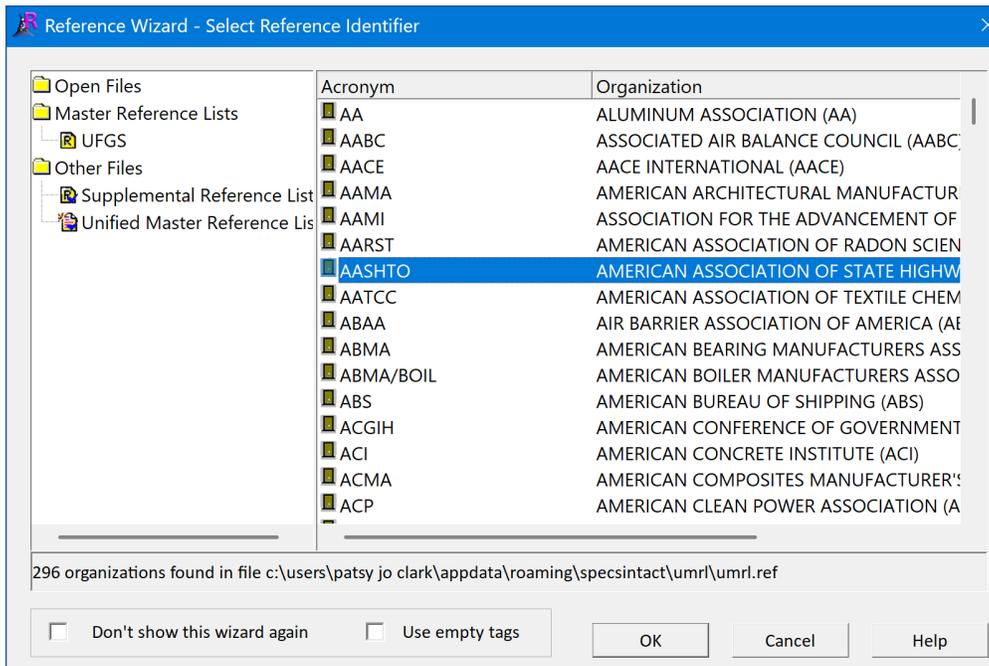
3. *Scroll* to find the Reference Organization you need (e.g., AASHTO).
4. *Double-click* on the organization to load all the Reference Identifiers (RIDs) contained in the **UMRL** that are available to choose from.
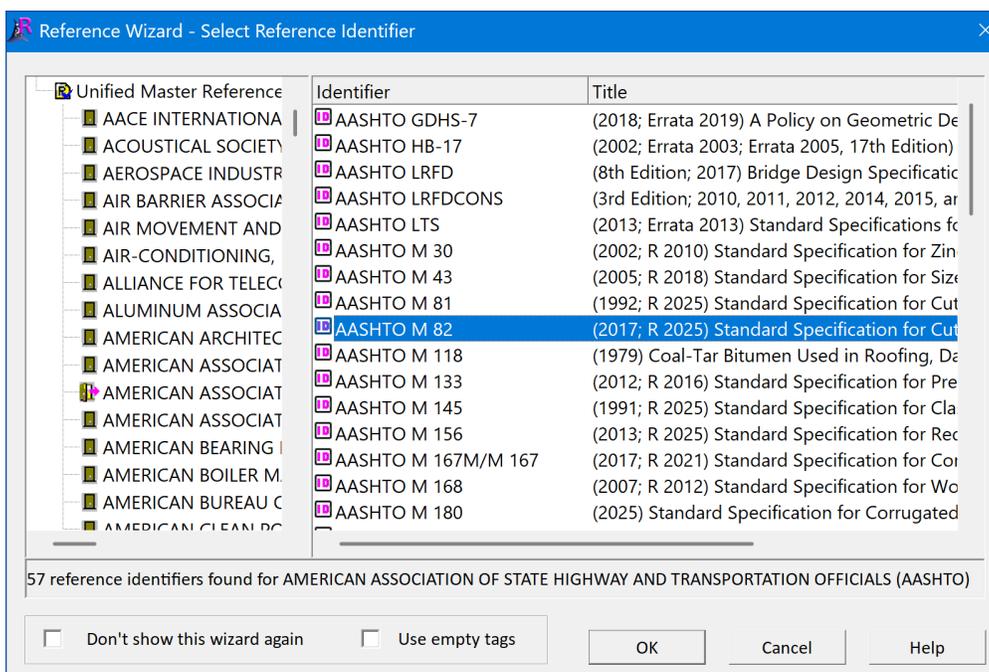
5. *Select* the Reference ID and Title you need (e.g., AASHTO M 82).
6. *Click* **OK**. You are then notified that this Reference is not in this Section's Reference Article and are asked if you would like to add it:
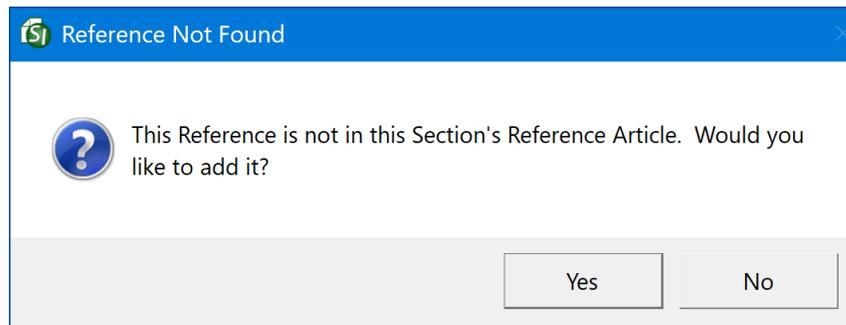
7. *Click* **Yes**, and the selected Reference get automatically added to your Section's Reference Article with all the required tags, but also advises you to check these changes:
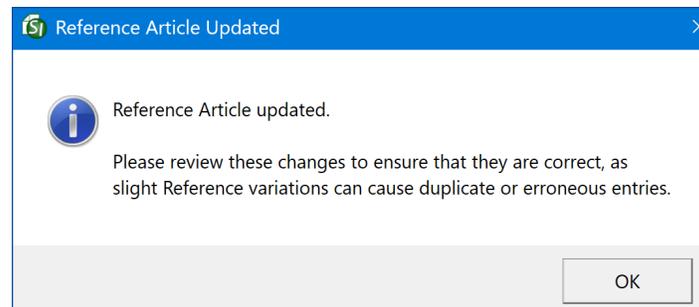
8. *Click* OK, and the **SI Editor** jumps to the exact location the new Reference was added:

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

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

<ADD><REF><ORG>AMERICAN ASSOCIATION OF STATE HIGHWAY AND TRANSPORTATION OFFICIALS
          (AASHTO)</ORG>

  <RID>AASHTO M 82</RID>              <RTL>(2017; R 2025) Standard Specification for
                                       Cutback Asphalt (Medium-Curing Type)</RTL>

  </REF></ADD><REF><ORG>AMERICAN CONCRETE INSTITUTE (ACI)</ORG>
```

Inserting a Reference Organization Not Already Included in Section

If the Reference Article doesn't already contain the Reference Organization (ORG) you need to insert, follow these steps:

1. *Place* your cursor in between the applicable existing Reference Organization's beginning and ending REF tags as shown below:

```
</REF><REF><ORG>U.S. DEPARTMENT OF DEFENSE (DOD)</ORG>

<RID>FC 1-300-09N</RID>          <RTL>(2014; with Change 6, 2021) Navy and
                                 Marine Corps Design</RTL>

</REF><REF><ORG>SHEET METAL AND AIR CONDITIONING CONTRACTORS' NATIONAL ASSOCIATION (SMACNA)</ORG>

<RID>SMACNA 1858</RID>          <RTL>(2004) HVAC Sound And Vibration Manual -
                                 First Edition</RTL>
```

2. This time, to insert a whole new Reference Organization (REF) and Reference Identifier (RID), *click* the **REF** button REF RID RTL ORG on the **SI Editor's Tagsbar**, or go to the **Insert** menu, *select* **Tags**, and find the REF tag and *click* **OK** to activate the **Reference Wizard**.
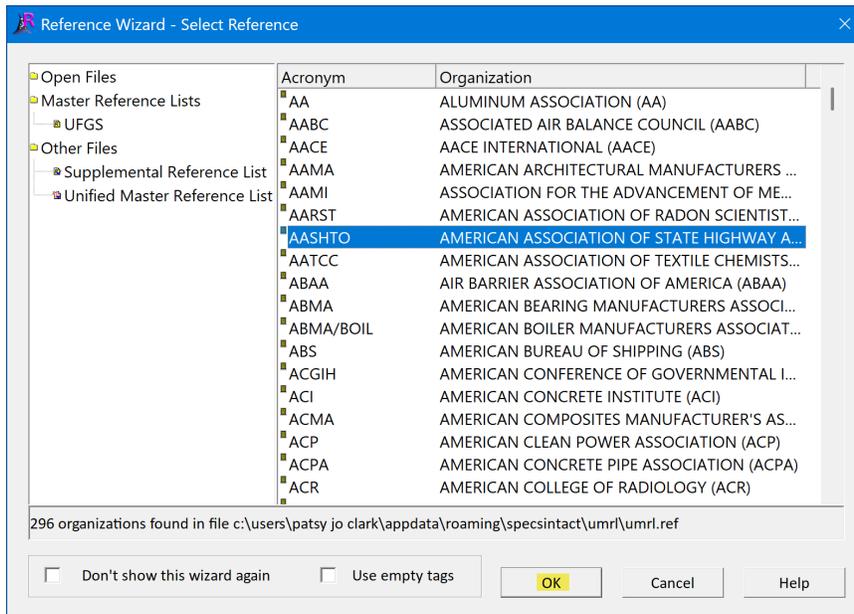

3. Next, *scroll* to find the Reference Organization you are looking for. Once found, *double-click* on it (AASTHO was used for this example), and all its associated Reference Identifiers (RIDs) are displayed. If the one you are looking for is listed, *select* it, then *click* **OK** and it is inserted with all the required information and tags:

```
</REF><REF><ORG>AMERICAN ASSOCIATION OF STATE HIGHWAY AND TRANSPORTATION OFFICIALS (AASHTO)</ORG>

<RID>AASHTO M 82</RID>          <RTL>(2017; R 2025) Standard Specification for
                                Cutback Asphalt (Medium-Curing Type)</RTL>

</REF><REF><ORG>ASTM INTERNATIONAL (ASTM)</ORG>
```
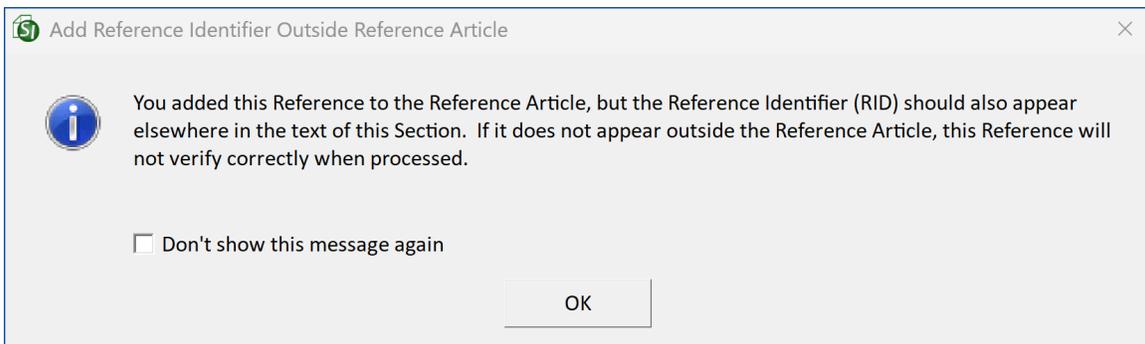
ℹ️ Note that if the Reference RID you wish to add does not show up in the organization's list, you can always *place* a check in the **Use empty tags** option and *click* **OK** to insert the template information to allow you to manually type in the Reference Identifier (RID) and the Reference Title (RTL) information.

```
</REF><REF><ORG>AMERICAN ASSOCIATION OF STATE HIGHWAY AND TRANSPORTATION OFFICIALS (AASHTO)</ORG>

<RID>Ref Id</RID>               <RTL>Ref Title</RTL>

</REF><REF><ORG>ASTM INTERNATIONAL (ASTM)</ORG>
```

❗ Please note this additional important information. If the Reference RID you *select* and insert in the Reference Article does not exist elsewhere in the Section text, you get the following pop-up message as a reminder:

---

⑤ Add Reference Identifier Outside Reference Article   ✕

ℹ️ You added this Reference to the Reference Article, but the Reference Identifier (RID) should also appear elsewhere in the text of this Section. If it does not appear outside the Reference Article, this Reference will not verify correctly when processed.

☐ Don't show this message again

[OK]

💡 We recommend inserting the RID into the appropriate text location immediately. However, if left unaddressed, **SpecsIntact** will flag the missing reference in the Reference Verification Report which is explained in that topic in this guide.

🎬 For additional guidance, watch the **Reference Verification Report** eLearning module within **Chapter 6 – Correcting QA Report Errors and Discrepancies.**

SI Editor's Submittal Tool and Wizard

Within the **SI Editor** there are two very helpful functions available to assist you in both checking that you have the most up to date Submittals as well as assisting with accurately inserting new or updated ones.

Both these Submittal tools utilize the **UFGS Master** 01 33 00 Submittal Procedures Section to scan and compare Submittal Descriptions for accuracy throughout Job Sections as well as Submittal Items within each Section to verify they are cited in both the Submittal Article and the text.

Manage your Submittals with precision using these dynamic **SI Editor** tools:

- **Check Submittal**: Boosts productivity by making it easy to update existing Submittals, alerting you to any that are missing, and then offering to insert them for you.

- **Submittal Wizard**: Extends the capabilities of the **Check Submittal** tool by automating the insertion of new References with the correct formatting and tags.

To learn more about the **SI Editor's Submittal Tool and Wizard**, refer to the Check Submittal and Submittal Wizard topics in the Web-Based Help**.**

Check Submittal Tool

The **Check Submittal** tool is helpful to easily check if a Submittal Item that is noted in the text of a Section is also listed in the Submittal Article – and vice/versa - as required.

To activate the **Check Submittal** tool, whether it be in the Submittal Article or anywhere in the Section text, simply place your cursor anywhere inside a pair of Submittal (SUB) tags and right-click to check the current Submittal Item is cited in both places.

```
<LST><SUB>SD-07 Certificates</SUB></LST>

    <ITM><SUB>Qualifications</SUB>; <SUB>G</SUB></ITM>
```

Thesaurus Lookup...	F8
Check Submittal...	

Verifying a Submittal Cited in the Submittal Article

To confirm a Submittal Item exists in both the Submittal Article and elsewhere in the Section text, follow these steps:

1. Place your cursor inside the Submittal Item's SUB tags (e.g., _{Qualifications}).

2. *Right-click* and *select* **Check Submittal**.

3. The **Check Submittal** tool will then scan the Section to ensure the item is also cited outside the Submittal Article.

If a matching Submittal Item is found elsewhere in the Section text, a window pops up confirming what Subpart it is located in.
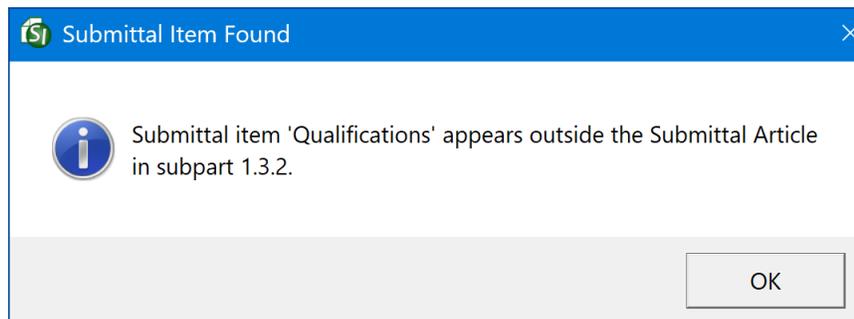
If a matching Submittal Item is not found, a different message window pops up, advising you that it should appear in an appropriate location outside the Submittal Article. This serves to alert you to then add it in the applicable place in the Section text.
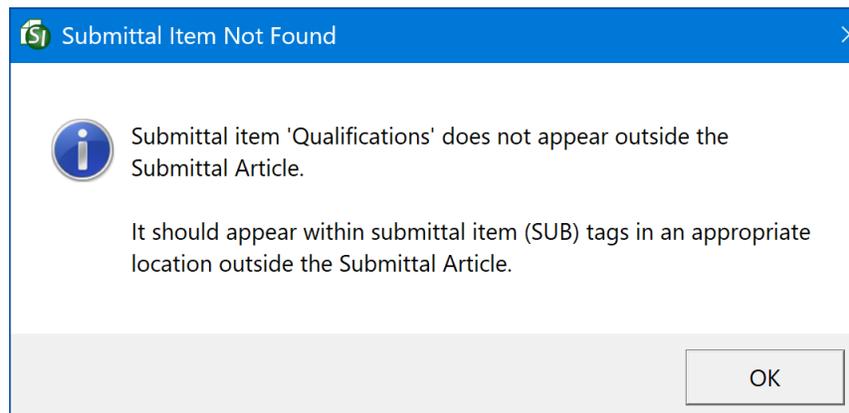
ⓘ Additional information on Submittal placement locations can be found under the [Section Submittal Discrepancies](#) topic in this guide.

Verifying a Submittal Cited in Section Text

To confirm a Submittal Item exists in both the Section text as well as the Submittal Article, follow these steps:

1. Place your cursor inside the Submittal Item's SUB tags (e.g., _{Qualifications}).

2. *Right-click* and *select* **Check Submittal**.

3. The **Check Submittal** tool will then scan the Submittal Article to ensure the item is also cited there.

If a matching Submittal Item is also found in the Submittal Article, a window pops up confirming this as well as offering which Submittal Description (SD-01 through SD-11) it is located under, as in the example below:
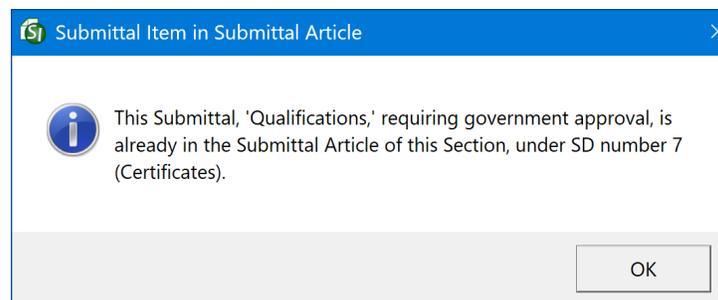
If a matching Submittal Item is not found in the Submittal Article, a window pops up confirming this and offers to add it.
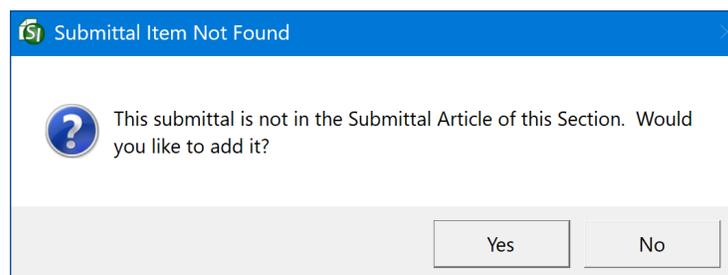
1. *Click* **No**, and nothing happens.
2. *Click* **Yes**, and the **Submittal Wizard** is automatically launched to assist you in placing it in the Submittal Article under the appropriate 'SD-XX Submittal Description'.

ⓘ   Additional information on inserting new Submittal Items in the Submittal Article can be found under the next Submittal Wizard topic in this guide.

🎞   For additional guidance, watch the **Submittal Wizard** eLearning module within **Chapter 3 – Editing.**

Submittal Wizard

Adding a new Submittal is made easy with the **SI Editor's Submittal Wizard**.

Insert a Missing or New Submittal in the Submittal Article

The **Submittal Wizard** mentioned in the previous topic is used to insert a missing Submittal Item in the Submittal Article. Depending on whether the Submittal Item already exists in the text of the Section or you are inserting a new one, follow these steps to insert it in the Submittal Article:

- **Submittal Item already exists in Section Text:** Activate this wizard by *right-clicking* inside the SUB tags of the existing Submittal Item (e.g., _{Qualifications}) then *right-click* and *select* the **Check Submittal** menu option.

- **Type in New Submittal Item:** To insert a completely new Submittal Item, first *type* the text, then *highlight* it. Next, *click* the **Submittal** 🔲 button located on the **SI Editor's Tagsbar**.

Either of the above options will activate the **Submittal Wizard** when a matching Submittal Item is not found in the Submittal Article. First, you are alerted that a matching Submittal Item is not found in the Submittal Article and are prompted if you would like to add it. If you click **Yes**, the **Submittal Wizard** is launched to assist you in placing it under the appropriate 'SD-XX Submittal Description' in the Submittal Article.

1. *Select* the appropriate **Submittal Item**, **Submittal Description**, **Approval/Classification** and **Reviewer** options from the **Submittal Wizard** window. For demonstration purposes, we're going to insert a new 'Qualifications' Submittal Item under the 'SD-07 Certificates' Submittal Description and give it a 'G' classification code. Since this is already an available option in the **Submittal Wizard** window, we can *select* it with those options as shown below:
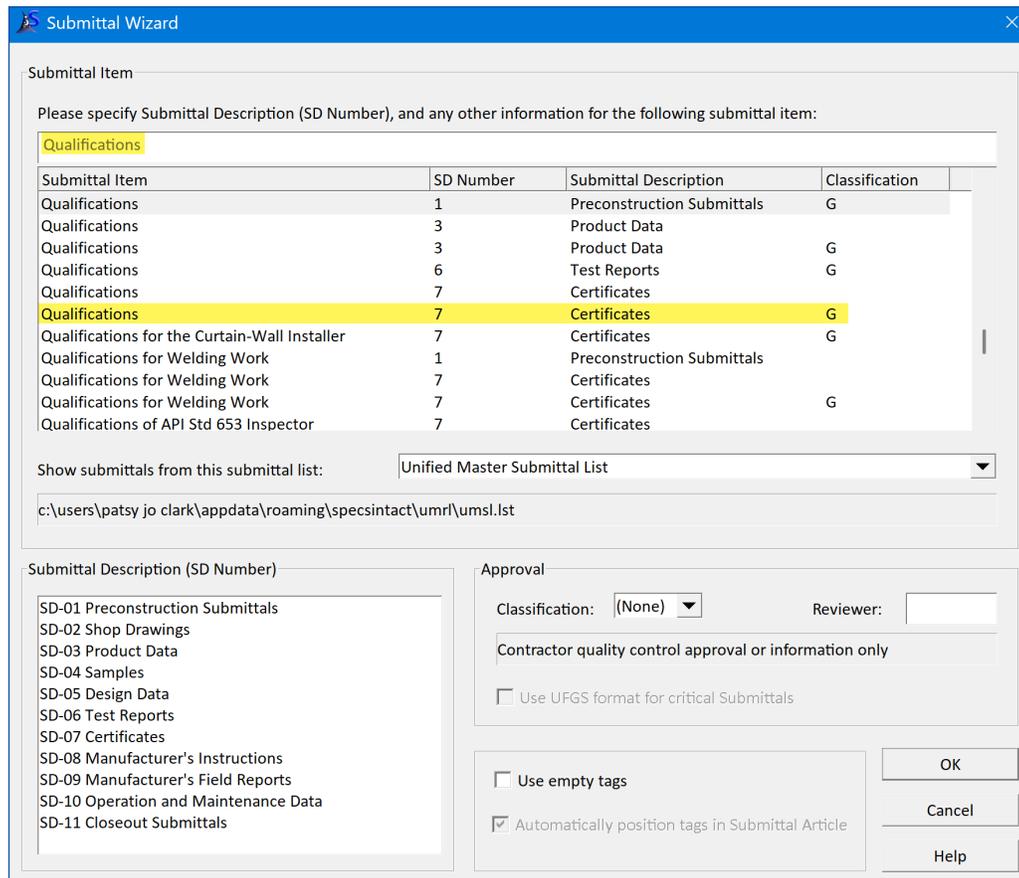
2. Once you have made the appropriate selections, *click* **OK** and the Submittal Item is added to the Submittal Article under the applicable Submittal Description (SD-01 through SD-11) and a confirmation window appears suggesting you review the changes to be sure they are correct:
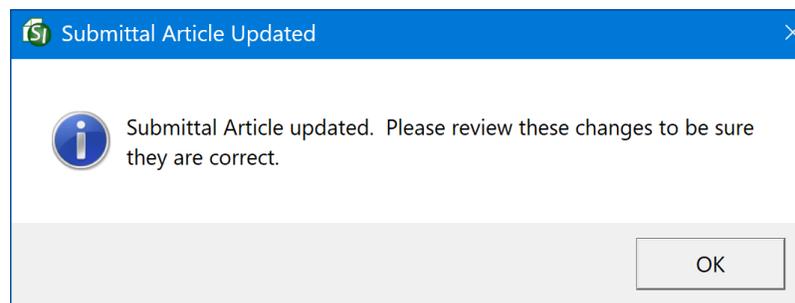
3. *Click* **OK** and the **SI Editor** jumps to the location of the newly added Submittal Item for you to easily review:

```
<LST><SUB>SD-07 Certificates</SUB></LST>

        <ITM><SUB>Qualifications</SUB>; <SUB>G</SUB></ITM>
```

Submittal Wizard Options

When adding a Submittal Item from the **Submittal Wizard** window, you have many options to choose from. If you do not find the exact Submittal Item needed already listed under the applicable Submittal Description (SD Number), you can manually make choices from all the available sections in the **Submittal Wizard** window.

- **Show submittals from this submittal list:** In the middle of the **Submittal Wizard** window, there is an option to **choose what Submittal Item list to load. The** default is the **Unified Master Submittal List (UMSL)** which is included as part of the **UFGS Master** you have connected. Additionally, you can select just those that are in the current Section or choose a connected Master. To select an option other than the default **UMSL**, click the drop-down arrow in the **Show submittals from this submittal list** option.
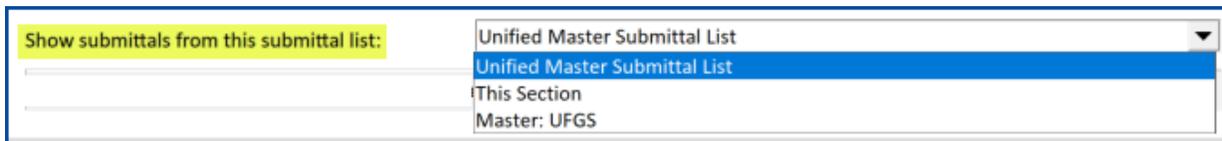
- **Approval:** In the **Approval** section of the **Submittal Wizard** window, you have an option to *select* an appropriate **Classification** code from drop-down list and manually insert a **Reviewer** code:
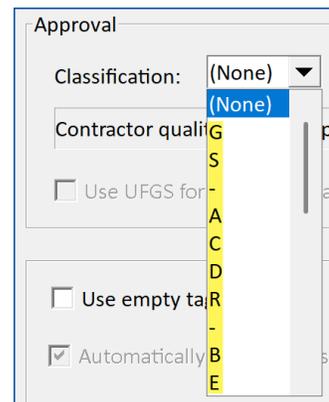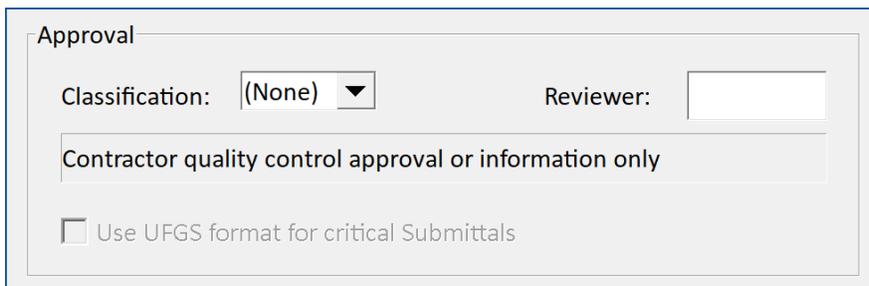
💡 If you *hover* over the **Classification** and **Reviewer** options in the **Approval** section, you get pop-up hints with some guidance as to which classification codes should be selected:

- **Submittal Description (SD Number):** *Select* the applicable SD Number you want to insert your Submittal Item under in the Submittal Article.

💡 If you *select* or *hover* over a particular **Submittal Description (SD Number)** in that section of the **Submittal Wizard** window, you get pop-up hints about that SD Number. See example above.

Once all your Submittal selections have been made, *click* **OK** to insert your Submittal in the Submittal Article with all your selected options applied.

❗ If you add a Submittal anywhere in the text of the Section (outside the Submittal Article), it MUST also be added in the Submittal Article under a valid Submittal Description.

Additional information on Submittal discrepancies can be found under the Submittal Verification Report in this guide.

For additional guidance, watch the **Submittal Wizard** eLearning module within **Chapter 3 – Editing.**

SI Editor's Section Reference Tool and Wizard

The **SI Editor** provides both a **Section Reference** tool and a **Section Reference Wizard** to ensure your project remains complete and accurate. These tools allow you to open referenced Sections directly from your current Section, making it easy to review their applicability. Furthermore, the **Section Reference Wizard** automates the process by inserting the reference into your text while simultaneously offering to add the referenced Section to your project.

Check and Open Referenced Section from Within Current Section

A **Section Reference** is used to reference other Sections and used for quality assurance and quality control of critical project elements.

To quickly and easily open a referenced Section from within the currently opened Section, right-click on that Section Reference (e.g. <SRF>01 33 00</SRF>) and select the **Open Section Reference** option. This Section then automatically opens in a new window in the **SI Editor**.

When a referenced Section is opened, your original Section stays open underneath. To go back, just close the newly opened Section by clicking the small 'x' at the top right of the **SI Editor** window.

Section Reference Wizard

The **Section Reference Wizard** automates the insertion of Sections and Section References within other Sections. By default, when activating the **Section Reference Wizard** within a Section in your Job, it only loads the Sections already contained in your project to choose from. The selected Section Reference is added complete with all the necessary components; the Section number itself gets inserted within Section Reference <SRF> tags, and the Section title is also inserted. This eliminates the need to manually type it, along with the necessary tags and components, and avoids keying errors causing potential discrepancies on the **Section Verification Report**.

1. To activate the **Section Reference Wizard** to insert a Section Reference, simply *place* your cursor where you would like to insert the new reference to another Section, then *click* the **Section Reference** ⬛SRF button on the **SI Editor's Tagsbar**. The **Section Reference Wizard** window opens:

By default, when activating the **Section Reference Wizard**, it loads the Sections already contained in your project to choose from.

If you choose to reference a **UFGS Master** Section that is not already included your Job, you can select the **Master: UFGS (primary Master)** option from the **Show Sections from:** drop-down box, and search for the Section you want to reference from the whole UFGS database, not just the ones already in your Job.
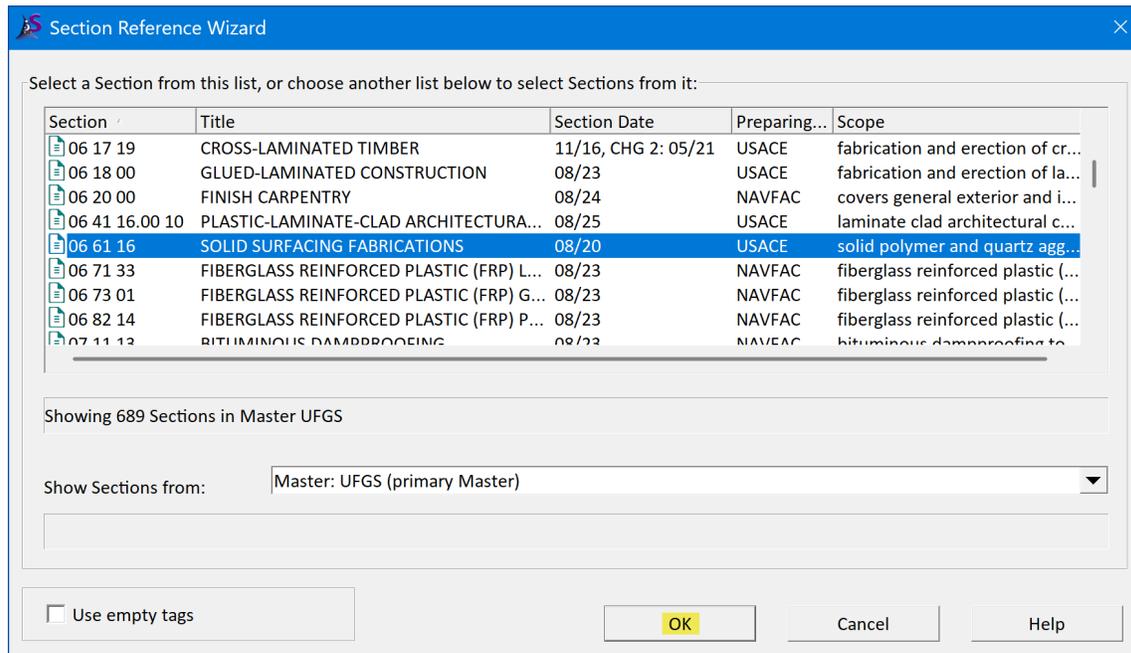
a. Once you find the needed Section, *click* **OK**. This will add the Section Number, along with the applicable Section Reference <SRF> tags and the Section Title in the text of the current paragraph exactly where your cursor was when you clicked the **SRF** button (e.g., <SRF>06 61 16</SRF> SOLID SURFACING FABRICATIONS).

b. Next, you are prompted to follow through and add the selected Section to your Job. Be aware that if you do **NOT** add the Section to your Job it will show up on the **Section Verification Report** as a missing Section.
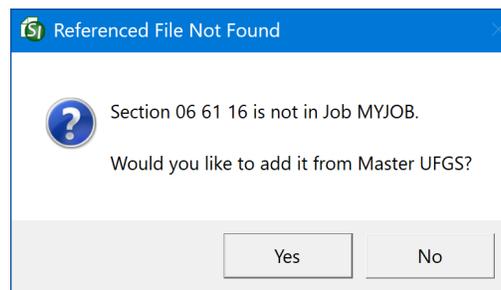
c. To proceed with adding the Section to your Job *click* **Yes**, and the Section is added to the Job. When you exit the **SI Editor**, you will see the newly added Section listed under your Job in the **SI Explorer**.

! If you are going to cite another Section within a Section in your Job, then you MUST also ADD it to your Job.

ⓘ Additional information on Section References can be found under the Tags and Section References and Section Verification Report topics in this guide.

🎞 For additional guidance, watch the **Section Verification Report** eLearning module within **Chapter 6 – Correcting QA Report Errors and Discrepancies.**

Additional Noteworthy SpecsIntact Menus

Beyond the wizards and tools covered in earlier chapters, **SpecsIntact** offers several options for customizing and tracking your projects. Both the **SI Explorer** and **SI Editor** contain comprehensive menu options designed to streamline navigation and provide immediate access to help resources, ensuring you can find the answers you need for any task.

SI Explorer - Customizing Views

Additional menu options in the **SI Explorer** allow you to customize the content you are viewing and utilizing in your Jobs and Masters.

- **Column Headers**: Go to the **View** menu and *select* **Column** to add/remove or change the order of the Section Columns that are displayed. See example below:

Name	Title	Section Date	Date Modified
📄 00 01 15	LIST OF DRAWINGS	02/24	11/13/2025 13:53

- **Choose Options to activate when SpecsIntact starts:** Go to the **Setup** menu and *select* **Options**. From the **General** tab, *select* options to use when the **SI Explorer** is open (e.g**., Save user name in Section properties when saving Sections** or allowing **SpecsIntact** to automatically **Check for Updates**). Some suggested options are checked by default, but you can *check/uncheck* those you prefer.

  💡 Utilize the **Specifiers** tab under **Options** to manage specifier names. These names then become available in the **Specifiers** tab in the **Properties for Job** window, where you can

assign these specifiers to the Divisions they are responsible for. *Click* the dropdown arrow next to the applicable Division to *select* from the pre-entered specifier list of names.

- **Change Colors on Folders and Sections**: You can change the color of the Job, Master or Section file icons by *right-clicking* on them and choosing the applicable **Icon Color** option from the right-click menu.

SI Explorer – Keyboard Shortcuts

Here is a list of available keyboard shortcuts for use in the **SI Explorer**:

- **Ctrl + Key**:
  - New Job - **Ctrl+J**
  - New Master - **Ctrl+M**
  - Print/Publish - **Ctrl+P**
  - Add Sections - **Ctrl+A**
  - Edit - **Ctrl+E**
  - Search and Replace - **Ctrl+F**

- **Function Keys**:
  - Screen Refresh – **F5**
  - Options – **F2**
  - Help – **F1**
  - Delete – **delete key**

SI Explorer - Menu Options

The **SI Explorer** menus offer some additional features and functions not readily available as shortcut Icon buttons on the main button panel.

✋ Not all the options on the listed **SI Explorer** menus or tabs below are mentioned - just the notable ones that have not already been addressed elsewhere in this guide.

SI Explorer - File Menu

When a specific Job under the **Jobs** folder is selected, most of the options on the **File** menu are available. The Job name becomes part of some of the options, which helps to alert you to what Job you are performing these functions on. As previously stated, you can also right-click on the Job name to bring up most of these menu options.

Noteworthy options on the **File** menu:

- **Delete Job**: Select the Job you wish to delete and select this option.

- **Duplicate Job**: Duplicate the Job under a new Job name.

- **Rename Job**: Do not try to rename a Job folder outside of **SpecsIntact**. You must use the **SpecsIntact** software to rename a Job.

- **Backup and Restore**: It is always good practice to back up your Jobs and any local Masters regularly. It's also a good way to archive a finished Job. This same function also provides a method for emailing your entire Job or Master in the .ZIP file format. Once you've stepped through the backup process and created a backup ZIP file (e.g., MYJOB_J.ZIP), you can then attach the file to an email to easily share it with others who can then utilize the **Restore** tab from the **Backup and Restore** window to load the Job into their **SpecsIntact** software.

    💡 To quickly attach one or more Sections to an email, right-click on the highlighted Section(s) and select the **Email** option to automatically attach them to a new Outlook message. All that's left for you to do is add the recipient and click send.

    🎬 For additional guidance, watch the **Backup a Job or Master** and **Restore a Job or Master** eLearning modules within **Chapter 8 – Additional Tools and Techniques.**

- **Search and Replace**: Search and/or replace a word or phrase within ALL Sections of the selected Job.

- **Export Search Results**: This option generates a 'SearchResults.htm' file listing all the Search results for the selected Job and places it in the **Exported Files** folder of the Job. If that folder does not yet exist, **SpecsIntact** creates it. Job search term results contain a list of the Sections the search term was found in and number of times it was used in each Section.

    ❗ This option is only available when search results have been generated and placed under the **Exported Files** folder that is generated under the applicable Job folder.

- **Execute Revisions**: This option allows you to **Execute Revisions** on the entire Job. This will make additions and deletions permanent in ALL Sections by removing all <DEL> tags and deleted text inside them, as well as making any additions permanent and removing the <ADD> surrounding that text.

- **Remove Change/Highlight Tags**: This option allows you to globally remove all Change (CHG) or Highlight (HLS) tags, but not their content, from the entire Job**.**

- **Remove English/Metric Units**: This option allows you to globally remove all Metric or English tags, including their content, from the entire Job**.**

- **Save to XML Format:** This capability is primarily intended for updating older Standard General Markup Language (SGML) **SpecsIntact** Jobs to the newer Extensible Markup Language (XML) format for an entire Job.

- **Specify PDF Folder:** This option allows you to change the location of the Job **PDF Files** folder.

- **Specify Word Folder:** This option allows you to change the location of the Job **Word Files** folder.

- **Properties:** This option opens the **Properties for Job** window for the selected Job.

SI Explorer - Sections Menu

When a Section (or Sections) are selected under a specific Job, most of the options on the **Sections** menu are available. As previously stated, you can also right-click on a Section or group of selected Sections to bring up most of these same menu options.

Noteworthy options on the **Sections** menu:

- **Copy**: This option allows you to copy the selected Section from the current Job to another Job. If preferred, use the standard keyboard shortcut keys to copy and then paste the Section into the target Job.

    💡 You can also drag and drop Sections to copy Sections from one Job to another.

- **Submit UFGS CCR for**: This option allows you to submit a Criteria Change Request (CCR) for the selected Section. This option will take you directly to the online form where you can fill out details for your suggested Section change request.

- **Change/Revision History for**: This option allows you to open the **National Institute of Building Sciences (NIBS) Whole Building Design Guide (WBDG)** Website's UFGS Section page for the selected Section in your default browser.

- **Renumber**: This option allows you to permanently renumber the Subpart levels within the selected Section(s) of the actual Section (.sec) files, not the processed (.prn) files.

- **E-mail**: To email files from any folder in the **SI Explorer**, right-click your selection and select **E-mail**. This automatically opens a new email window with your selected Sections or PDFs already attached and ready to send. <u>NOTE</u>: The default email address is the **SpecsIntact** Support email address; however, you can change it as needed.

- **Rename**: This option allows you to rename the selected Section (change the Section Number) or name of a Document.

  ❗ Do not open and edit a Section to change its number, you MUST change the number using this option.

- **Delete**: This option allows you to delete the selected Section or multiple selected Sections.

- **Overwrite**: This option allows you to overwrite one or more selected Sections in a Job. Right-click on the Section(s) and select **Overwrite** to replace the Section(s) from the original source. <u>NOTE</u>: The source of the Section must be a Master or Job that is still available on your system.

- **Delete Section Comments**: This option allows you to delete the Section Comments for a Job in one or more selected Sections.

- **Properties**: This option allows you to open the **Section Properties** window on the selected Section.

The following options on the **Sections** menu were explained in the [SI Explorer - File Menu](#) above in this guide. However, when accessed from the **Sections** menu they can be applied to one or more selected Sections without having to be applied to all the Job Sections:

- **Tailor**
- **Search and Replace**
- **Execute Revisions**
- **Remove Change/Highlight Tags**
- **Remove English/Metric Units**
- **Save to XML Format**

SI Explorer - Process Menu

Noteworthy options on the **Process** menu:

- **Reference Processing for Job**: This is a multi-function window for processing References throughout a Job. Select options that allow you to process References (**Reconcile references in Reference Articles, Generate new Reference Articles in Sections**, etc.) on all .SEC Section files in your Job. You can also access options that allow you to generate, edit or print a **Supplemental Address List** or **Supplemental Reference List** – also based on the **UMRL** or **UFGS** database of your choice.

- **Release Processing for Job**: This option allows you to generate or update a specific Job's:

  o **Project list of Sections (Pull Table)**
  o **Mark all as unified (or old) submittal format**
  o **Delete all Sections properties**.

  ⓘ All other options in this window are grayed out, as they only pertain to **Release Processing** when a Master is selected instead of a Job. These include:

  o **Table of contents with/without scope**
  o **Master Reference List**
  o **Reference Location List**
  o **Master Submittal List**
  o **Tailoring Option List**
  o **Set MasterFormat version**

- **Convert Manual Lists to Order Automatically**: This feature is used to convert lists that use the LST and ITM tags in an entire Job or Section to use the alpha-numeric Ordered Lists that will renumber and re-letter automatically.

- **Convert to Automatic Paragraph Numbering**: The conversion process will remove the Subpart number and three spaces from all Subpart Titles throughout the Sections. Once this is done, a Meta Data (MTA) tag will be added at the top of each Section. After completion, **SpecsIntact** will automatically number the Subparts for the Sections while editing, printing, and publishing.

- **Convert Font Attribute and Center Tags to BLD, UND, ITA and CTR**: This option will convert all the applicable HL1, HL2, HL3, and HL4 tags in your Job Sections to the updated/applicable Bold (BLD), Underline (UND), Italics (ITA) and Center (CTR) tags.

- **Export Submittal Register for Job**: This feature is used to export the Submittal Register data to either a web file, spreadsheet, or comma-delimited file.

- **Package Builder**: This option offers many options for creating a comprehensive PDF package for a Job or Master. You can compile a single PDF file by adding PDF Section files and report files from **SpecsIntact**, as well as adding other external PDFs from outside of **SpecsIntact**, and arrange them in any order you choose.

SI Explorer - View Menu

Noteworthy options on the **View** menu:

- **Toolbar**: Display or hide the **SI Explorer's Toolbar**.

- **Status Bar**: Display or hide the **SI Explorer's Status Bar.**

- **Columns**: Display or hide available **Column** names in the **SI Explorer's Contents** pane or change the order in which they appear.

- **Refresh**: The **Refresh** feature reloads/updates to the information currently displayed.

SI Explorer - Tools Menu

Noteworthy options on the **Tools** menu:

- **Section Template**: This template is used as an outline for creating new Sections. This option allows the user to manage their Section Templates by either creating a new template, editing, copying, or deleting an existing template.

  > New Sections can be created from the **Add Sections** window. Additional information on adding a new Section from an existing Section Template can be found under the Adding Sections to a Job topic in this guide.

- **SI Document Templates**: This option allows access to blank SI Document Templates that can be used to create cover sheets, sign-off sheets, project information sheets, or other unique documents to be used with specifications in multiple Jobs.

- **Software Change Request**: This menu gives you the options to create/edit, delete or print forms to submit **SpecsIntact** Software Change Requests.

- **SI Editor**: This option opens the **SpecsIntact Editor** so you can either create a new Section or document or open an existing file.

- **Find Files**: This option opens the standard Microsoft Windows advanced **Search Tools** window so you can perform a broad search for files located on your computer and network drives.

- **Windows Explorer**: This option provides an easy way for the user to jump to/open the selected Job or Master folder location in Windows Explorer.

SI Explorer - Setup Menu

Noteworthy options on the **Setup** menu:

> (i) Additional information on the first two **Tools** menu options (**Working Directories** and **Connect Masters**) can be found under the [Working Directories and Connect Masters](#) topic in this guide.

- **Install SpecsIntact PDF Printer**: This function will install or reinstall the **SpecsIntact PDF** printer for both **SpecsIntact** and **SpecsIntact Lite**.

- **Options**: Open this to set default behaviors and options for Jobs. The **General** tab has many settings to choose from as well as options on when you want **SpecsIntact** to check for updates to the software, **UFGS Masters** and/or **UMRL**. Click on the **Specifiers** or **File Locations** tabs to add that type of information for easy insertion or quick access within your Jobs.

- **Reset Settings**: The options within this window will restore the settings back to the application defaults.

SI Explorer Help Menu

From the **SI Explorer Help** menu, you can access the following:

- **SpecsIntact Help**: Links directly to the searchable **SpecsIntact** Help database.

- **Check UFGS Master Version**: This option lets you check if you have the latest released copy of the **Unified Facilities Guide Specifications (UFGS).**

- **SpecsIntact Website**: Links directly to the **SpecsIntact** website resources to download software and Masters and keep up on new developments regarding the software.

- **SpecsIntact Web Help Center**: Links directly to the **SpecsIntact** website for resources to assist both novice and proficient users. Here you can discover the Installation Guide, eLearning Modules, Online Help and Support Center.

- **Unified Facilities Guide Specifications (UFGS)**: Links directory to the UFGS Masters webpage.

- **UFGS Changes and Revisions**: Links directory to the UFGS Master Changes and Revisions webpage.

- **Send Log File to Help Desk**: This option automatically generates an email, addressed to the **SpecsIntact** Help Desk, with the **SpecsIntact Explorer** error log (Errorlog.log) attached. This log records many of the issues encountered and is sometimes necessary for our Technical Support Team to help troubleshooting and fix problems.

- **About SpecsIntact**: Allows you to **Check SI Version**, **Check UFGS Version**, or **Show Disclaimer** options. This window also displays the current **SI** version (e.g., SI v5.7.0.230) and what kind of **SI** installation was used (e.g., SI executable installation).

  💡 Both the **SpecsIntact** version and installation type are important when contacting tech support for assistance.

SI Editor - Editing Tips

The **SI Editor** has some very helpful editing tools including, keyboard shortcuts and many ways to select text for editing and deleting.

SI Editor – Keyboard Shortcuts

Here is a list of available keyboard shortcuts for use in the **SI Editor**:

- **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**:
  - Repeat Last Set of tags – **F2**
  - Next – **F3**
  - Help - **F1**
  - Insert Tags - **F4**
  - Spell Check - **F7**

- **Shift + Function Keys**:
  - Revisions On/Off - **Shift+F8**

  Delete tagged elements - **Shift+Delete**

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**

SI Editor – Editing Techniques

There are various techniques available in the **SI Editor** that can be used to select tagged elements and text. Combining these techniques will help you become a proficient editor.

Methods for Selecting and Deleting Text

Use keyboard shortcuts, double-clicking, selecting and scrolling, as well as other methods of highlighting text in the **SI Editor**.

Keystrokes for Selecting Text

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

- **Shift+Ctrl+End** - selects from cursor to the end of the Section.

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

ℹ️ Additional information on selecting and deleting text can be found under the [Deleting Text](#) topic in this guide.

Double-click Method to Select Text

When removing a subpart, double-clicking is the recommended method for selection. Unlike manual highlighting, double-clicking automatically includes all hidden tags and elements. This keeps your document clean and prevents tagging errors and stray spaces or unnecessary hard returns.

To remove an entire subpart, follow these steps:

1. *Place* the cursor on a word within the subpart title and *double-click*.
2. *Double-click* again and the selection expands to include the immediate surrounding text and pair of tags.
3. *Double-click* one more time and the selected region expands to include entire subpart.

If needed, you can continue to use this method until you have multiple subparts selected or even the entire Part**.**

❗ Be aware that you cannot select an entire Section by using the double-click method.

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

Highlighting Text and Deleting Using Revisions

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

💡 The best way to remove only the tags, not the text, without having to turn Revisions OFF is to use the keyboard shortcut **Ctrl+M** or place the cursor between the tags (e.g., _{**|**}), right-click and choose the **Remove Tags** option.

The following example shows where to begin and end the highlighted text you wish to delete:

⚠ In instances where you use the highlighting and scrolling method to select text it is very important to do it properly. This means including blank lines and extra spaces as shown above.

This is the result of highlighting and deleting as shown above with Revisions ON:

These examples can also be used whether you are using Revisions or not, but it is the preferred method for editing with Revisions ON.

SI Editor Menu Options

The **SI Editor** menus offer some additional features and functions not readily available as shortcut Icon button options on the **Tagsbar**. Not all the options on the listed menus or tabs below are mentioned - just the most notable ones.

SI Editor - View Menu

- **Toolbars and Docking Windows**: Default options are already checked and active on each of the tabbed option windows. Uncheck options you do not wish to be default settings on each of the following tabbed windows. A few notable options are noted under each tabbed option below:

  o **Save** tab: Make choices in the available drop-down option fields.

  (1) **Perform automatic backups every**: *Select* how often you want the **SI Editor** automatically backs up Section edits (1 to 100 minutes).

(2) **Tailoring options deletion drop-down options:** At the bottom of the **Save** tab, the default option is **Prompt before deleting hidden Tailoring Options**. *Click* the drop-down option to change it to one of the other 2 options available.

o **Edit** tab: See sample of available checkbox options on this tab.

(1) **Provide hint text when the mouse cursor hovers over tags**
(2) **Retain last Revisions view setting when closing a Section file**
(3) **Use Submittal and Section Reference Wizards**

o **References** tab: From this tab, you can choose whether to use the **Reference Wizard** for inserting Reference tags, which Reference List to use for checking references, and whether to check for **UMRL** and **USML** updates automatically.

o **Display and Navigator** tab: Choose which **SI Editor** theme to use, whether to display the **SI Navigator** on the left-hand side of the **SI Editor**, and even increase or decrease the size of the Icons on the **SI Editor's Tagsbar**.

- **Editor Theme**: Choose from **Classic**, **Twilight**, **Deep Blue**, **Midnight**, or **Custom**.

- **Application Look**: Choose from **Blue**, **Light Blue**, **Silver**, **Gray**, **Back**, **Classis Blue-Gray** or **Retro Gray**.

- **Tailoring Options**: Opens the **Tailoring Options** window to view all Tailoring Options available in the current Section.

- **View options not available as buttons on the default Tagsbar**: **English**, **Metric** (or **Both**), **Marks**, **Colors**, **Numeric Paragraphs**. NOTE: All these options also have keyboard shortcuts available to turn them on/off.

SI Editor - Insert Menu

- **Page Break (Ctrl+Enter)**: Inserts a hard page break where needed.

- **Insert Tags (F4)**: Access and insert all tags from here, in addition to the ones available on the **SI Editor's Tagsbar**.

- **Last Tag (F2)**: Quickly repeat inserting the last tag you previously inserted.

- **Tailoring**: Select and insert Tailoring Options tags around selected text or remove existing Tailoring Options.

SI Editor - Format Menu

- **Change Case (Alt+K)**: Opens the **Change Case** window to allow you to quickly change the case on the selected text.

- **Increase Ordered List Indentation (Tab)**: *Click* the **Tab** key inside an ordered list item (OLI tags) to increase the level of indentation.

- **Decrease Ordered List Indentation (Shift+Tab)**: *Click* the **Shift+Tab** keys inside an ordered list item (OLI tags) to decrease the level of indentation.

- **Promote Subpart**: This option only works to increase the level of the selected subpart, by right-clicking on the subpart in the **Navigator**.

SI Editor - Tools Menu

- **Options**: This brings up the same window as the **Toolbars and Docking Windows** menu under the SI Editor - View Menu above.

- **Thesaurus Lookup (F8)**: Select a word to get a list of Similar Terms, Synonym and Antonym category options. NOTE: You must have a word highlighted before selecting this option.

SI Editor - Help Menu

- **Submit a CCR for Section**: This option loads the Change Criteria Request (CCR) form to allow you to report and submit a technical or non-technical (grammatical) change to the current Section.

- **About SpecsIntact Editor**: Displays the version of the **SI Editor** you have installed (e.g., SI v5.7.0.230).

Additional SpecsIntact Editing Info and Tips

There is some additional helpful information within this topic that will aid you during the editing process.

Tag Character Limits

Certain component tags within **SpecsIntact** Sections have character limitations you should be aware of:

- **Section Title** (within STL tags):
    - 120 Characters (e.g. <STL>PROJECT SCHEDULE</STL>)

- **Section Number** (within SCN tags):
    - 14 Characters (industry standard - e.g., <SCN>01 32 01.00 10</SCN>)

- **Date** (within DTE tags):
    - 5 Characters (e.g., <DTE>08/23, CHG 1: 08/24</DTE>)

- **Article Titles** (within TTL tags in a two-level subpart):
    - 71 Characters (e.g., <SPT =1.1>1.1 <TTL>REFERENCES</TTL>)

- **Paragraph Titles** (within TTL tags in a three-level subpart):
    - 68 Characters (e.g., <SPT =2.1.1>2.1.1 <TTL>Contractor Software</TTL>)

- **Sub-Paragraph Titles** (within TTL tags in a four-level**+** subpart):
    - 60 Characters (e.g., <SPT =2.1.2.2>2.1.2.2 <TTL>Contractor Software</TTL>)

- **Reference Organization** (within ORG tags):
    - 511 Characters (e.g., <ORG>U.S. ARMY CORPS OF ENGINEERS (USACE)</ORG>)

- **Reference Identifier** (within RID tags):
    - 30 Characters (e.g., <RID>ER 1-1-11</RID>)

- **Reference Title**: (within TTL tags):
    - 300 Characters (e.g., <RTL>(2017) Administration - Project Schedules</RTL>)

- **Section Reference**: (within SRF tags):
    - 14 Characters (industry standard - e.g., <SRF>01 33 00</SRF>)

Table Formatting and Editing Tips

Here are some helpful tips when creating and editing a Formatted Table:

- **Use TXT, LST, ITM or CTR Tags Outside of Table**: For additional flexibility, tables may be placed within Text (TXT), List (LST), Item (ITM) or Center (CTR) tags to allow more control of table positioning within the page margins.

- **Use UND, ITA and BLD Tags Inside Table Cells**: Formatting tags that you can use around text inside a table are those for underline (UND), *italics* (ITA) and **bold** (BLD).

- **Use Table Menu to Adjust/Justify Text inside Table Cells**: Use the **Table** menu > **Justify** option inside a cell to select to adjust text within it to the Left, Center, or Right. This will make table editing less complicated than using tags.

- **Tagging References and Submittal Within a Table**: Apply additional tagging for References and Submittals, etc. after all the information has been entered into the table.

- **Tables inside Notes**: A table can be located inside a Note. However, do NOT place note paragraph (NPR) tags around a table within a Note.

- **Formatting English/Metric Within a Table**: 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.

- **Using Revisions Within a Table**: 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.

SI Editor - Validation Errors

Upon saving a Section in the **SI Editor**, the Section is automatically scanned for any tagging errors. If any are found, a **Validation Error** log is generated, and a message alerts you:
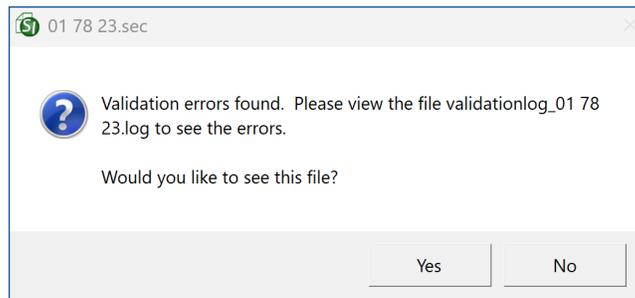
To see the **Validation Error** log, click **Yes** and it opens it in a new **SI Editor** window:

```
================================================================
Validating C:\Users\Documents\Jobs\MYJOB\pulldata\01 78 23.sec
Date and Time: Fri Feb 20 10:30:05 2026

HINT: Double-clicking an entry will open the Section in the Editor.

Subpart: 1.1 <Unknown Title>

    Subpart: 1.1 - Rules Violation: Subpart has no title (TTL tags
    missing).
```

💡 Just as in other **SpecsIntact** reports, you can double-click on the subpart number to jump to the subpart location of the error in the Section.

Understanding and Fixing Validation Errors

In the example above, the validation error is informing you that subpart 1.1 is missing a title, or if it does have a title, it does not have TTL tags surrounding it. In this case the latter is true, as shown below:

```
<SPT =1.1>1.1    REFERENCES

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

❗ Validation errors are based on **SpecsIntact** tagging rules, so in this example, the **SI Editor** is expecting to find TTL tags within every subpart in the Section. If any subpart does not have TTL tags it is then reported when the Section validation scan is done.

ⓘ Additional information on **SpecsIntact** tagging rules can be found under the Tag Rules topic in this guide.

Additional Validation Error Examples

Here are some additional examples of other validation errors and how to fix them:

- **Rules Violation: Subpart has no title (TTL tags missing)**

  o In the previous example, this validation error was simply a matter of missing TTL tags around the REFERENCES title.

  o This same validation error occurs when a whole subpart is deleted, but the subpart tags themselves are inadvertently left in and not deleted. In this case the validation still was just searching to make sure every set of subpart tags include a <TTL>Title</TTL>, and none was found in either of these scenarios, resulting in the same exact validation error.

- **Rules Violation: Reference has no Organization (ORG tags missing)**

  o In this case, validation found a set of REF tags in the Reference Article that is missing an organization name (e.g., 'ASTM INTERNATIONAL (ASTM)') or it was there but the required ORG tags were missing around it.

- **Rules Violation: Reference "ASTM INTERNATIONAL (ASTM)" Unequal numbers of Reference Identifiers (3) and Reference Titles (2)**

  o In this case, validation compared the number of Reference Identifiers (RIDs) within the ASTM INTERNATIONAL (ASTM) Reference Organization, and it found (3) RIDs but only (2) had the required Reference Title (RTL) tags associated with them. So, either one of the RIDs was missing or the Reference Title was there but it did not have the required RTL tags around it. The latter was the case in the example below (e.g., RTL tags are missing from around the Reference Title for ASTM E1971):

```
</REF><REF><ORG>ASTM INTERNATIONAL (ASTM)</ORG>

<RID>ASTM A36/A36M</RID>          <RTL>(2011) Carbon Structural Steel</RTL>

<RID>ASTM E1971</RID>(2005; R 2011) Standard Guide for Stewardship for the Cleaning of
Commercial and Institutional Buildings

<RID>ASTM E2166</RID>          <RTL>(2016; R 2023) Standard Practice for
                               Organizing and Managing Building Data</RTL>

</REF><REF><ORG>U.S. DEPARTMENT OF DEFENSE (DOD)</ORG>
```

- **Rules Violation: 'SPT' Cannot Contain 'SUB'**

  o In this case, validation scanned the Submittal Article to make sure all the necessary information and tags were correct around all the Submittal Descriptions and Submittal Items. According to the **Validation Error** log, it found a Submittal Item surrounded by SUB tags by itself. This is a violation of a tagging rule, as SUB tags cannot be inserted in the Submittal Article paragraph without being surrounded with a formatting tag (TXT, LST, or ITM). See example below:

```
    <LST><SUB>SD-10 Operation and Maintenance Data</SUB></LST>

<SUB>Facility Data Workbook</SUB>; <SUB>G</SUB>

    <ITM><SUB>Training Plan</SUB>; <SUB>G</SUB></ITM>
```

So, in this case, the correct tag to insert around this Submittal Item is the ITM tag since that contains the needed indentation level as shown in the 'Training Plan' Submittal Item below it.

There are additional scenarios that occur that can cause validation errors like the ones outlined above. This is why it is important to be familiar with **SpecsIntact** tagging rules so when these occur, you'll be equipped to identify and correct the error. Additional information on **SpecsIntact** tagging rules can be found under the Tag Rules topic in this guide.

For additional guidance, watch the eLearning modules within **Chapter 5 – Resolving Validation Log Errors.**

SI Editor - Tagsbar Layout Hints

If you look closely at the **Tagsbar** in the **SI Editor**, the tag buttons are laid out in the order they are used throughout a Section. Additionally, if a color is associated with a particular element, the tag

button is also color-coded appropriately to that element (e.g., the Submittal (**SUB**) button is bright blue).

PRT SPT TTL TXT LST ITM LST ITM MET ENG REF RID RTL ORG OAD SUB SRF

Section structure tags are the first tags listed on the **Tagsbar**. These are listed in the order in which they are used:

PRT SPT TTL TXT LST ITM

- Part (PRT): Outermost tag for each of three required Parts

- Parts contain Subparts (SPT)

    o Subparts MUST contain Titles (TTL)
    o No text inside a Subpart can be untagged, so it MUST be surrounded by one of the available formatting tags (TXT, LST, or ITM)

- TXT, LST, and ITM tags can contain additional tagged elements within the text inside them:

MET ENG   RID   SUB SRF   **B** *I* <u>U</u>
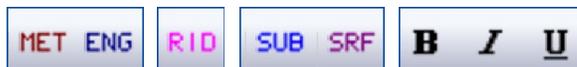
    o Metric (**MET**) or English (**ENG**) measurements
    o Reference Identifiers (**RID**)
    o Submittal Items (**SUB**)
    o Section References (**SRF**)
    o **Bold** (BLD)
    o *Italic* (ITA)
    o <u>Underline</u> (UND)

ⓘ   Additional information on Section tags can be found under the SpecsIntact Tagging topic in this guide.

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, **SpecsIntact** performs the following scans and places the information on a spreadsheet-like report for ease of locating all the Submittal Items throughout the Job:

- Searches for the Submittal Article within PART 1 of each Section.
- Locates all tagged Submittal Descriptions (SD-01 – SD-11) listed in each Section's Submittal Article.
- Locates the Submittal Items appearing below each SD# throughout the Sections.
- Generates the **Submittal Register** and inserts the Subpart location for each Submittal Item in the Sections' text (outside the Submittal Article).

			SUBMITTAL REGISTER					CONTRACT NO. 123456							

TITLE AND LOCATION: EXAMPLE JOB FOR DOCUMENTATION — CONTRACTOR

ACTIVITY NO	TRANSMITTAL NO	SPEC SECT	DESCRIPTION ITEM SUBMITTED	PARAGRAPH	CLASSIFICATION / GOVT OR A/E REVIEW	CONTRACTOR: SCHEDULE DATES SUBMIT	APPROVAL NEEDED BY	MATERIAL NEEDED BY	CONTRACTOR ACTION ACTION CODE	DATE OF ACTION	DATE FWD TO APPR AUTH/ DATE RCD FROM CONTR	DATE FWD TO OTHER REVIEWER	DATE RCD FROM OTH REVIEWER	APPROVING AUTHORITY 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)
		01 33 00	SD-01 Preconstruction Submittals														
			Submittal Register	1.9	G												
		03 33 00	SD-02 Shop Drawings														
			Detail Drawings	1.4.1	G												
			SD-04 Samples														
			Materials	2.1	G AE												
			Panels	1.4.2	G AE												
		06 61 16	SD-02 Shop Drawings														
			Detail Fabrication Drawings	1.4.2	G												
			Installation	3.1	G												
			SD-03 Product Data														
			Solid Polymer	2.1.1	G												
			Indoor air quality for solid surface seam and sealant products	2.2.2	S												
			Quartz Agglomerate Material	2.1.1	G												
			SD-04 Samples														
			Material	2.1	G												
			Counter Tops	2.3.6	G												
			SD-06 Test Reports														
			Test Report Results	2.1.1													

❗ The **Submittal Register** (REGISTER.PDF) does not appear in the **SI Explorer's Processed Files** folder the way the other reports and lists do. It will, however, print when you click **Process & Print**. If you are publishing to PDF, it will appear in the **PDF Files** folder under the Job name folder in the **SI Explorer**.

ℹ️ Additional information on and generating the **Submittal Register** can be found under the Submittal Register topic in this guide.

Troubleshooting the Submittal Register

Here are some examples of **Submittal Register** report problems and the cause of them:

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

> Additional information on valid Submittal Descriptions and Submittal Items can be found under the Tags and Submittals and Submittal Wizard topics in this guide.

> To learn more about Classification and Reviewer codes, refer to the Submittal Formatting Guidelines topic in the Web-Based Help**.**

The Submittal Register Output Options

SpecsIntact offers three output options in addition to the **SpecsIntact** printed **Submittal Register**: output to a **Web Format** (.htm), a **Comma Delimited Format** (.txt) and to **Microsoft Excel Format** (.xlsx). These exported files are then placed in the **Exported Files** folder under the Job name:

> All three **Submittal Register** output formats can be generated at the same time or separately, just by selecting those option(s) on the **Export Submittal Register** window shown below.
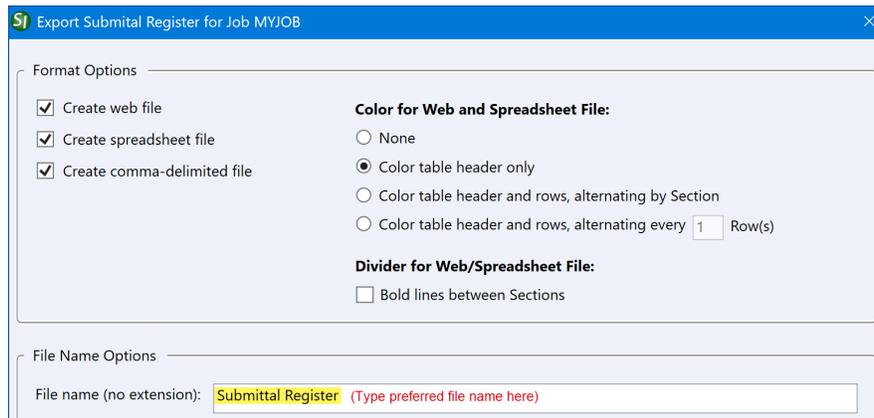
The exported files are placed in the **Exported Files** folder under the Job name:
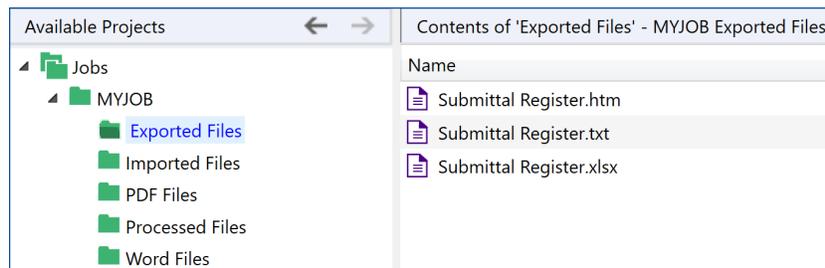
To attach these files to an email:

1. Select file(s) you want to email.
2. *Right-click* and *select* **E-mail**.
3. **SpecsIntact** automatically opens a new email window and attaches the selected files to it.

💡 Alternately, you can *right-click* on the **Exported Files** folder and *select* **Open in Windows Explorer** to access those files there. Then you can either 'copy and paste' or 'drag and drop' them into an email.

🎞 For additional guidance, watch the **Submittal Wizard** eLearning module within **Chapter 3 – Editing.**

Job Checklist – Steps from Start to Finish

Please see the following guidelines on a Job's life cycle from start to finish. These checklist items have all been discussed in earlier topics in this guide but have been consolidated in the order in which to perform the recommended steps – prior to Job creation all the way to the final phase of the project.

1. Make sure you have the most recent **SpecsIntact** software installed as well as the latest **UFGS Master** downloaded and connected.

    (i) Additional information on updating the **SpecsIntact** software and the **UFGS Master** can be found in the **Installation Guide** on our Support and Help Center webpage.

2. Print the **UFGS Master** Table of Contents <u>with Scope</u> to PDF from and forward the file 'SCOPE.PDF' file to the project engineer to decide which Sections they would like to include in the Job. You must generate this by selecting the **UFGS** folder in the **SI Explorer** and then clicking the **Print/Publish** button.

    (i) Additional information on generating and publishing the Project TOC can be found under the Pre-Job Checklist and Guidance Notes and Print Processing – Reports Tab/Table of Contents topics in this guide.

3. Use marked up Master Table of Contents to then create the Job by adding the selected Sections.

    (i) Additional information on creating a Job can be found under the SpecsIntact Workflow - Creating and Publishing a Job topic in this guide.

4. Once the Job is created and contains all the applicable Sections, run the **Export Tailoring for Job** function and provide this list to the engineer to pre-edit the list.

    (i) Additional information on exporting Tailoring Options can be found under the Pre-Printing, Markup and Editing Considerations and Questions topic in this guide.

5. Once you receive the marked up Tailoring Options report back from the engineer, Tailor the Job accordingly.

    (i) Additional information on pre-tailoring a Job can be found under the Using Tailoring Options to Pre-Edit a Job topic in this guide.

6. Ask pre-editing questions prior to providing Sections for mark-up.

    ℹ️ Additional information on pre-editing questions can be found under the Pre-Editing Questions topic in this guide.

7. Print/Publish Job Sections to PDF or Word and send them to engineer(s) for initial markups.

    ℹ️ Additional information on optimal print options for first time markup can be found under the Print Recommendations for Sections Prior to First Markups topic in this guide.

8. Receive markups and edit Job Sections as cleanly as possible based on the tagging and editing rules defined in this guide.

    ℹ️ Additional information on editing a Job can be found under the SI Editor - Editing Tips topic in this guide.

9. Print/Publish all **SpecsIntact** reports to QA your edits and resolve any errors or discrepancies.

    ℹ️ Additional information on processing and publishing **SpecsIntact** reports can be found under the Cleaning Up SpecsIntact Reports topic in this guide.

10. Once you've fixed the report issues that you can handle on your own, re-publish your Sections as PDF or Word files. Send published Sections back for review and additional edits. Be sure to include any reports that require engineering attention and select the appropriate print options from the **Print Processing** window under the **Options** tab > **Show** section that are applicable for this phase of the Job (e.g., you may or may not need to continue publishing with Notes showing, etc.).

    ℹ️ Additional information on publishing Job Sections can be found under the Understanding Process and Print/Publishing topic in this guide.

11. When you receive the next round of markups, repeat steps 8 through 11 above again.

12. Once the Job has been deemed FINAL, use the **SpecsIntact Package Builder** feature to compile a complete PDF file of your project for delivery.

SpecsIntact and UFGS Resources

For any **SpecsIntact** Technical Support or assistance, please contact the **SpecsIntact** Help Desk either by phone or email.

SI Technical Support

For **SpecsIntact** technical software support, contact the team weekdays from 7:00 AM–3:30 PM Central Time:

- **Phone**: 256.895.5505
- **Email**: specsintact@usace.army.mil

SI Website Resources

Please see additional **SpecsIntact** webpage links and information:

- **Main SpecsIntact/WBDG Website:** https://specsintact.wbdg.org

Latest SpecsIntact Version Locations And Installation Information

- **Download Latest SpecsIntact Version:** https://specsintact.wbdg.org/software/download

  - **Army/USACE** – *Request from App Portal*
  - **Navy** – *Request from local IT Department (Software Center)*
  - **Air Force** – *Request from local IT Department*

- **SI Lite – See Chapter 2 of SI Installation Guide:** https://www.wbdg.org/tools/specsintact/InstallationGuide.pdf

- **SpecsIntact Support and Help Center:** https://specsintact.wbdg.org/support-help-center

  On this page:

  - **Link to Installation Guide:** https://www.wbdg.org/tools/specsintact/InstallationGuide.pdf
  - **Link to SpecsIntact (Searchable) Web-based Help:** https://www.wbdg.org/tools/specsintact/Help/index.htm#t=Welcome.htm

- **Submit a Software Change/Enhancement Request:** Go to **SI Explorer > Tools** menu **> Software Change Request > Create/Edit Form**. Fill out the form in detail and provide contact information.

UFGS Resources

- **UFGS Masters Website:** https://www.wbdg.org/dod/specsintact/masters

- **UFGS Changes and Revisions:** https://www.wbdg.org/dod/ufgs/ufgs-changes-revisions

- **Unified Master Reference List (UMRL):** https://www.wbdg.org/FFC/DOD/UMRL/UMRL.pdf

- **CSI MasterFormat Section List:** Contact your designated agency Dataset Manager for information on licensing for this manual: https://www.csiresources.org/home

Additional UFGS Standard Guidelines and Documents:

- **UFS 1-300-02 (Unified Facilities Guide Specifications (UFGS) Format Standard):** https://www.wbdg.org/dod/ufc/ufc-1-300-02

- **MIL-STD-3007G (Standard Practice Unified Facilities Criteria, Facilities Criteria and Unified Facilities Guide Specifications):** https://www.wbdg.org/dod/fedmil/mil-std-3007

- **ER 1110-1-8155** USACE requirement at: ER 1110-1-8155.pdf (army.mil) (**SpecsIntact** is the Standard Specification Software System which is a DoD requirement for all Army, Navy, and Air Force construction specification projects.)

eLearning Video Library

Throughout this User Guide, you will find references to the applicable eLearning modules. Provided below is a link to the main eLearning website and the 'eLearning_Library.PDF' file that lists all the available eLearning modules.

- **SpecsIntact eLearning Videos:** https://www.wbdg.org/dod/specsintact/elearning

- **SpecsIntact eLearning FULL Video Library List/TOC:** https://www.wbdg.org/tools/specsintact/media/eLearning_Library.pdf