# SpecsIntact eLearning Modules Transcript

## Module: Chapter 9 – Custom UFGS Master Guidelines

This transcript provides the text from the corresponding eLearning Module. Screenshots have been added as a visual aid however, we highly recommend that you view the corresponding eLearning Module for in-depth visual representation of the subject matter.

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As we embark on this adventure, we will presume that you are an advanced user or you have completed the full series of eLearning modules. In this lesson, we will demonstrate a process developed by the Sacramento District that will guide you through the steps of customizing the Unified Facilities Guide Specifications (UFGS) specifically for a particular District Master by eliminating information that does not apply and incorporating District specific information. Although this process was developed by USACE, any agency can adapt it to meet their requirements. This process initially takes a considerable amount of time to prepare, but will ultimately save a tremendous amount of time for the design team and the corresponding Architect and Engineering Firms by ensuring consistency and efficiency, which will allow the AE Firms to focus on the details and design much faster.
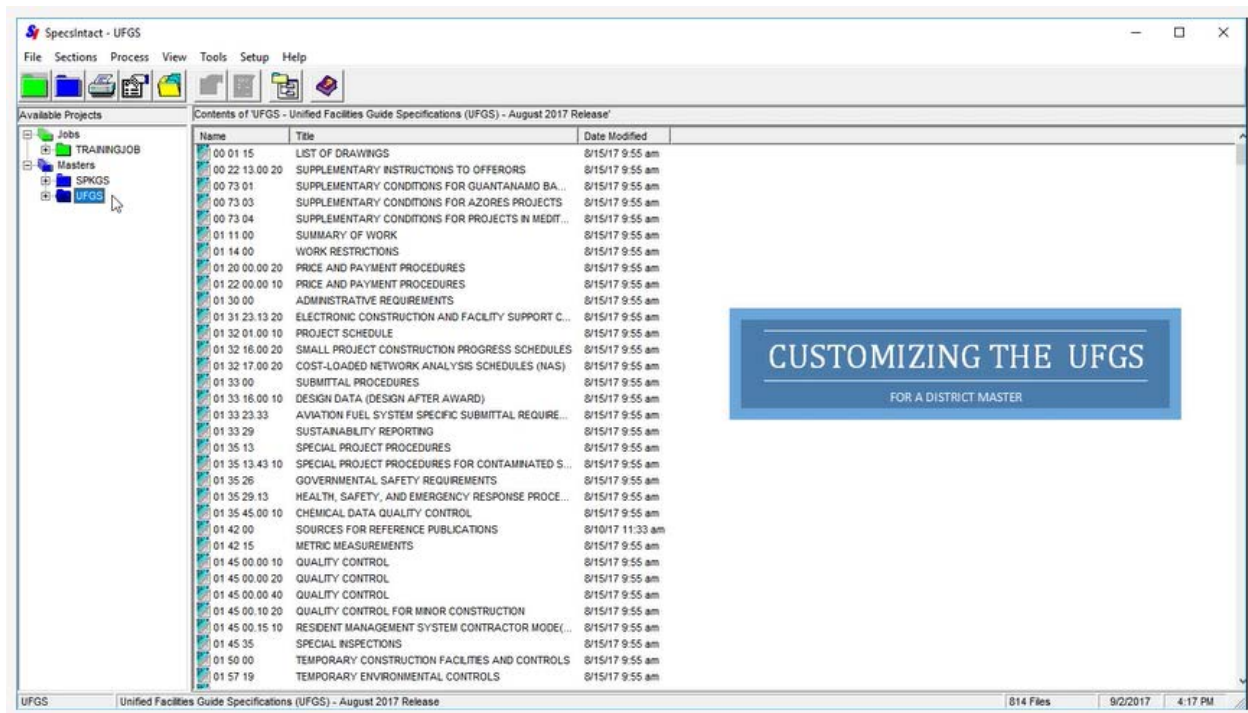
In order to keep the customized UFGS Master current, this process has to be repeated with each quarterly UFGS Release. The UFGS Release Cycle occurs February, May, August and November.
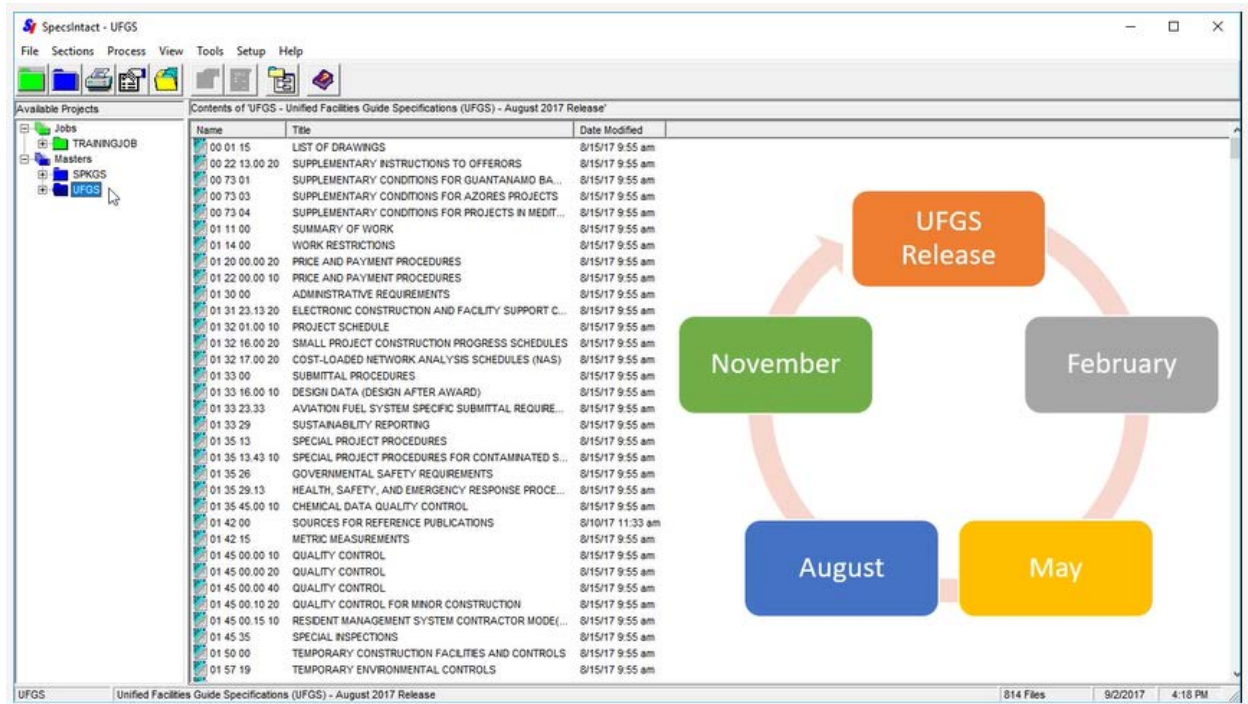

In addition, you need to ensure to maintain the Sources for Local Reference Publications since it is an essential component of this process.
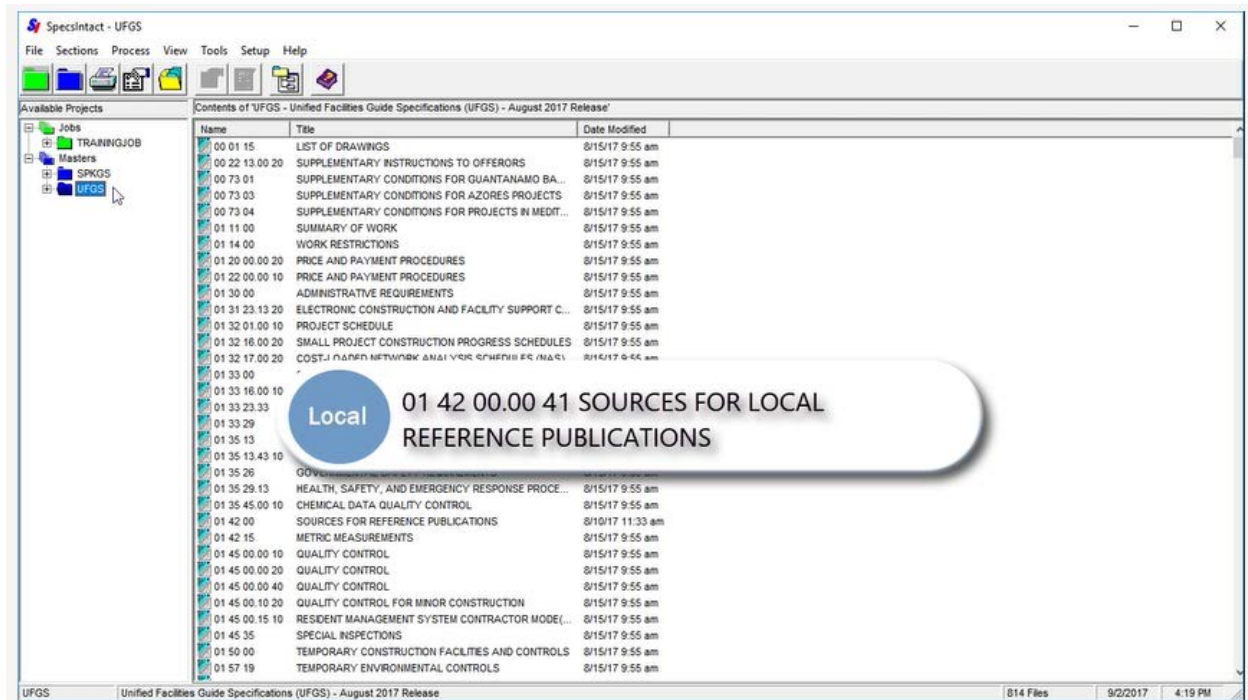
Since the foundation of the new Master is the UFGS Master you want to make sure, you have the latest UFGS Master and the corresponding UFGS Changes and Revisions List.
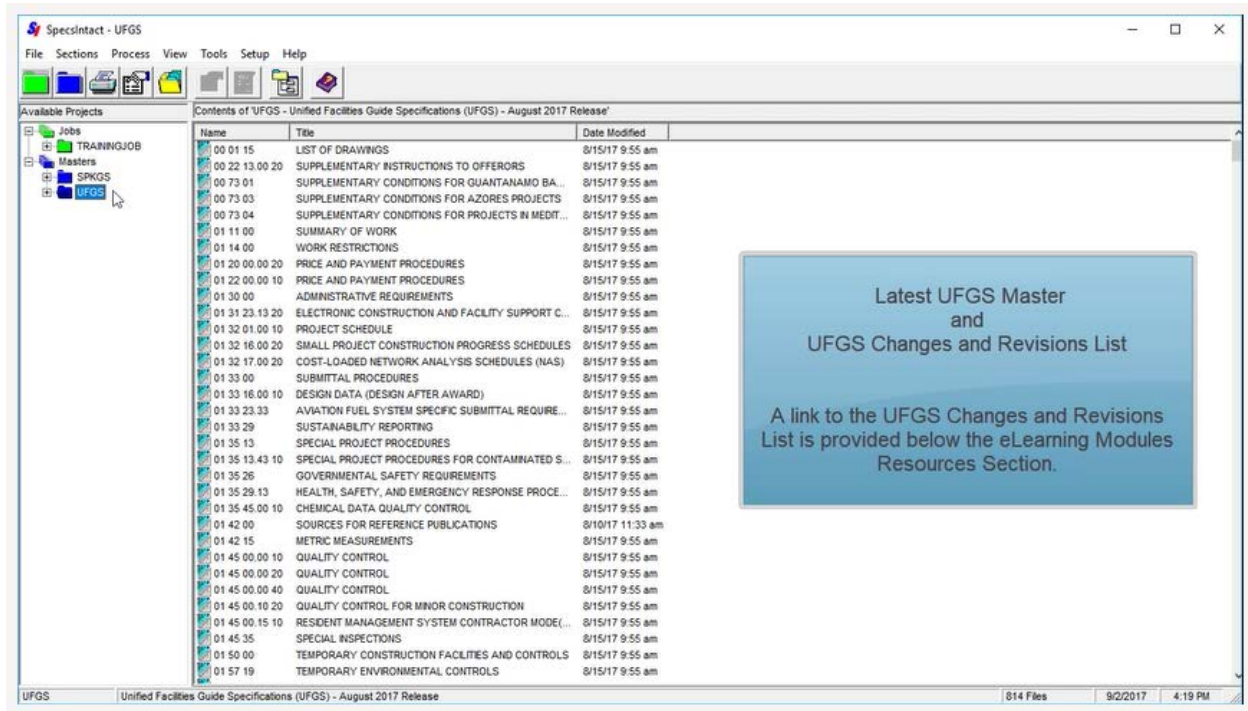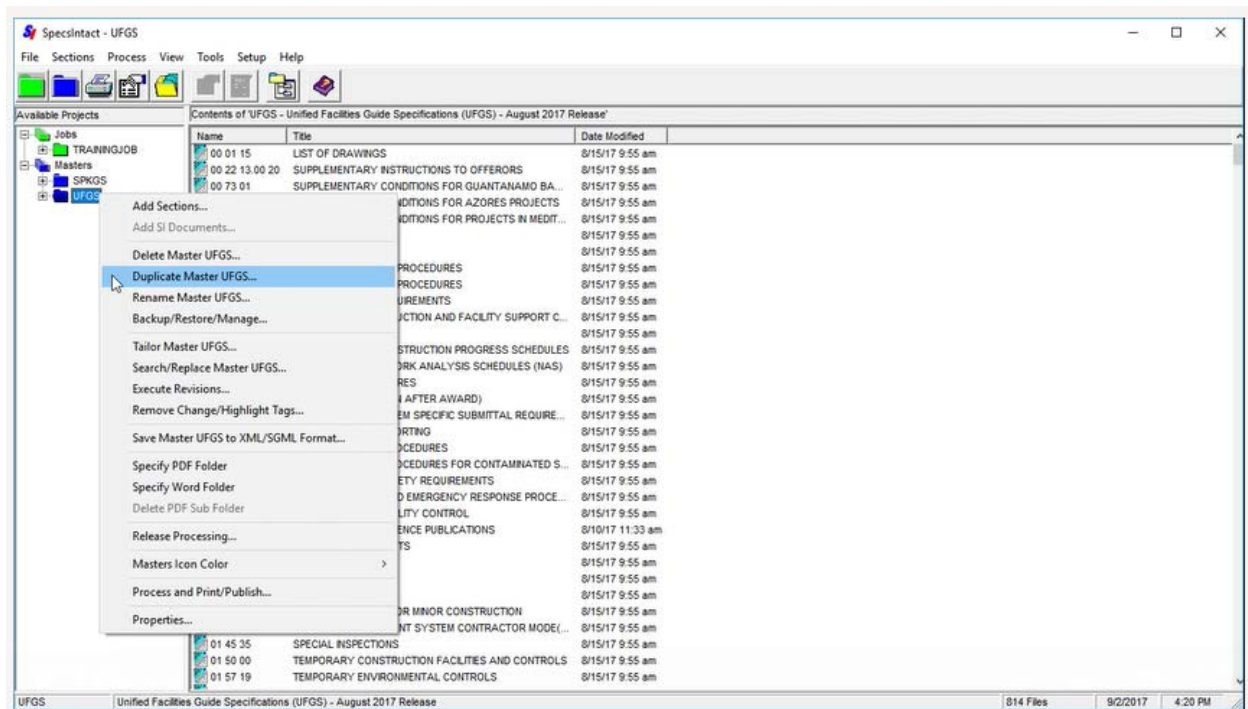

By default, SpecsIntact will automatically download the latest UFGS, but you will need to download the UFGS Changes and Revisions List from the Whole Building Design Guides UFGS Page.
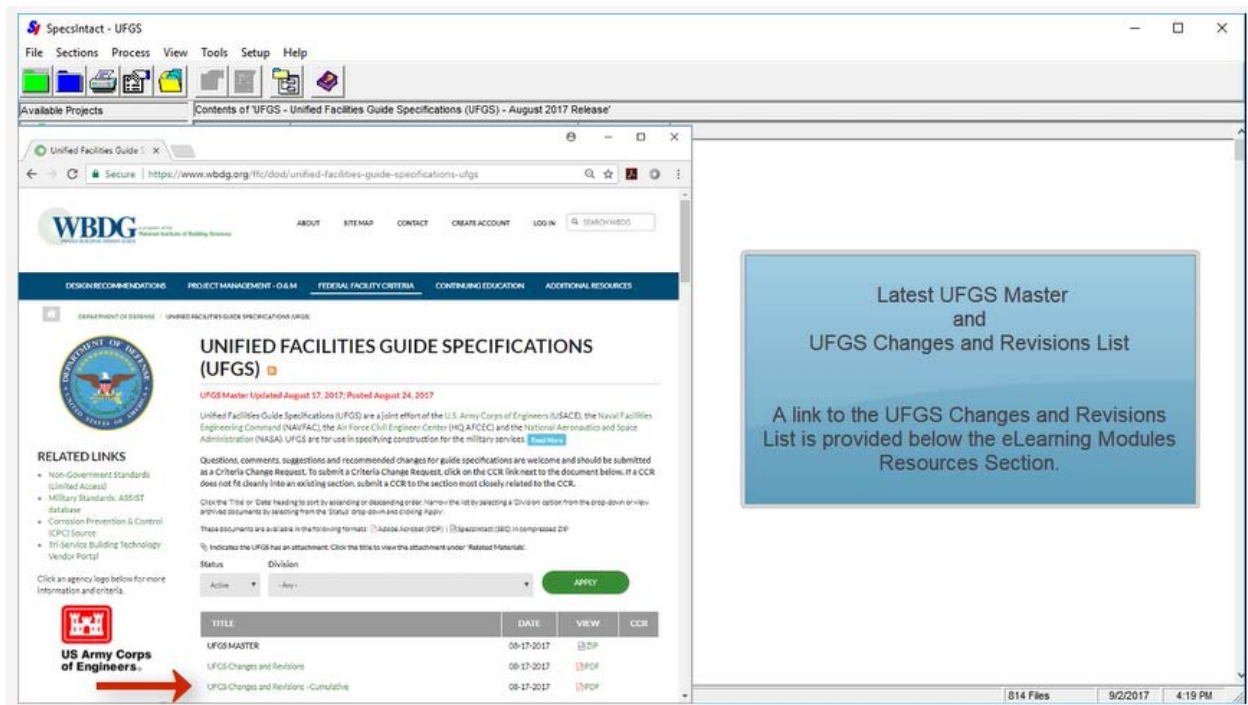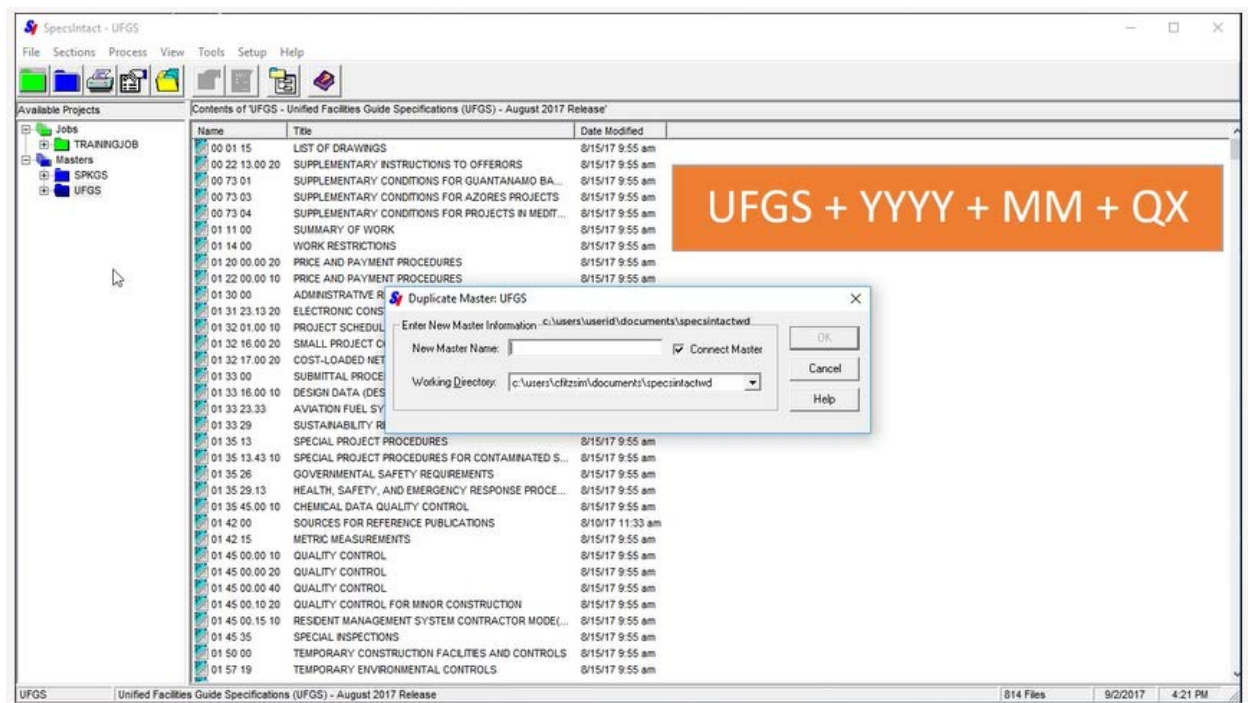
Let's begin by duplicating the UFGS Master, *right-click* and *select* **Duplicate Master UFGS**.


When naming the Custom UFGS Master, we suggest UFGS followed by the four-digit year, two-digit month and the quarter the UFGS Master was released, which is identified by either Q1, Q2, Q3 or Q4.

Let us go ahead and *enter* the new name as **UFGS201705Q3**, which indicates this Master was released in May during the second quarter of 2017. Before completing this task, make sure you have the correct Working Directory selected. If necessary, you can select the dropdown arrow to select a different Working Directory from the list. The Master can be saved on a network or local drive. Once you have completed the customization process, you would then move it to a networked drive so others can begin to use it. Let us go ahead and *select* **OK**.
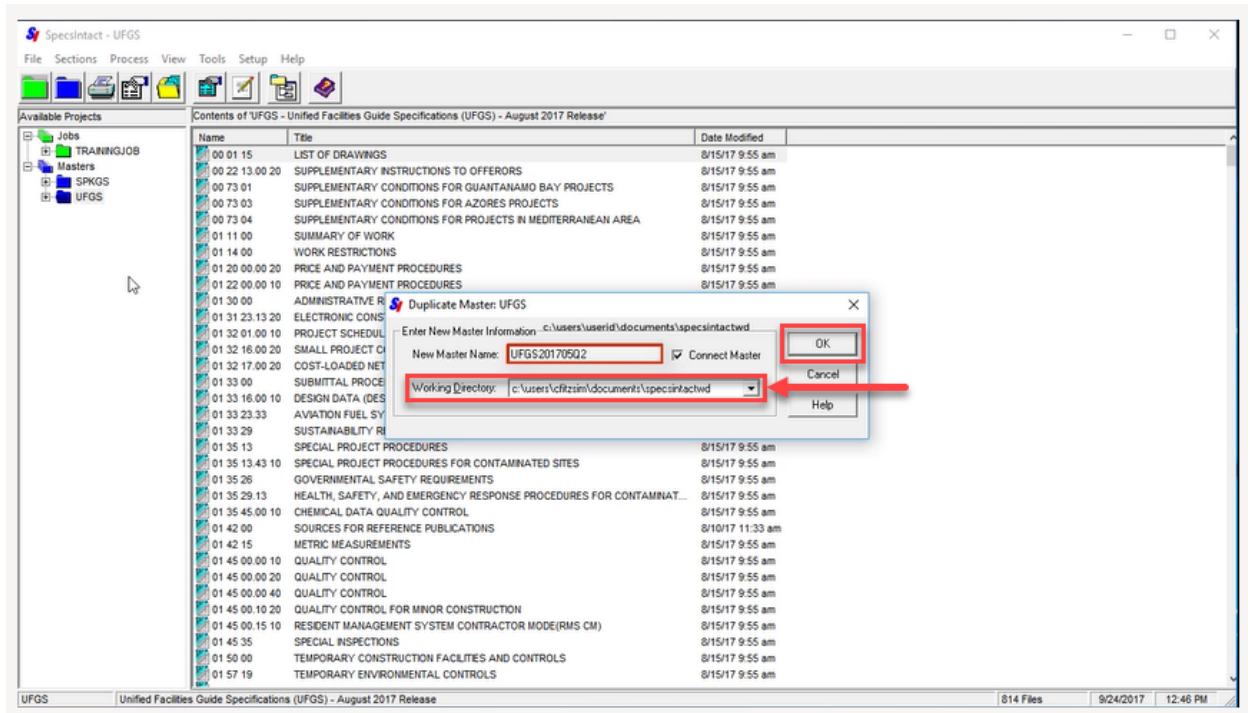

When the confirmation windows opens, *select* **Yes**. The UFGS Master contains more than 800 Sections, which will take time to duplicate, especially if it is on a network drive.
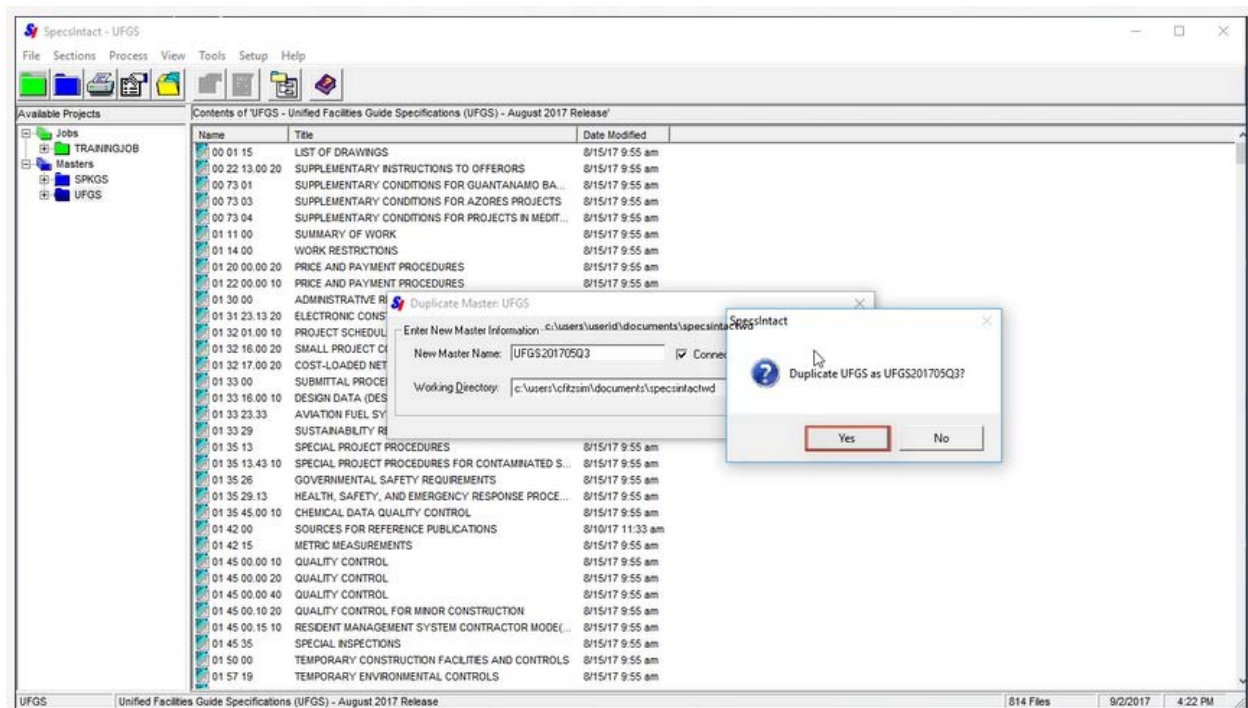
Now that we have the Master duplicated, it is time to begin the customization process. Within the SpecsIntact Explorer, make sure you have the UFGS201705Q2 Master selected, then *place your cursor* over the **right pane**, *right-click* and *select* **Column Headers**.
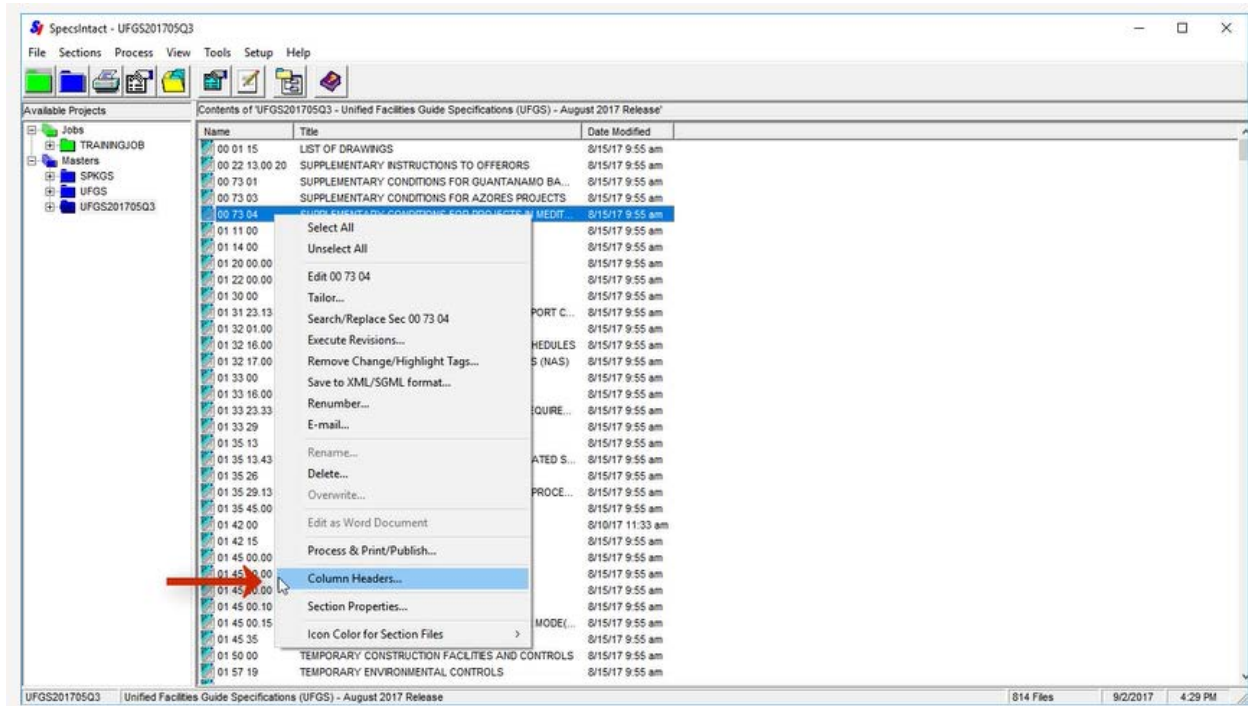

Choose Preparing Activity and *Select* **OK**.
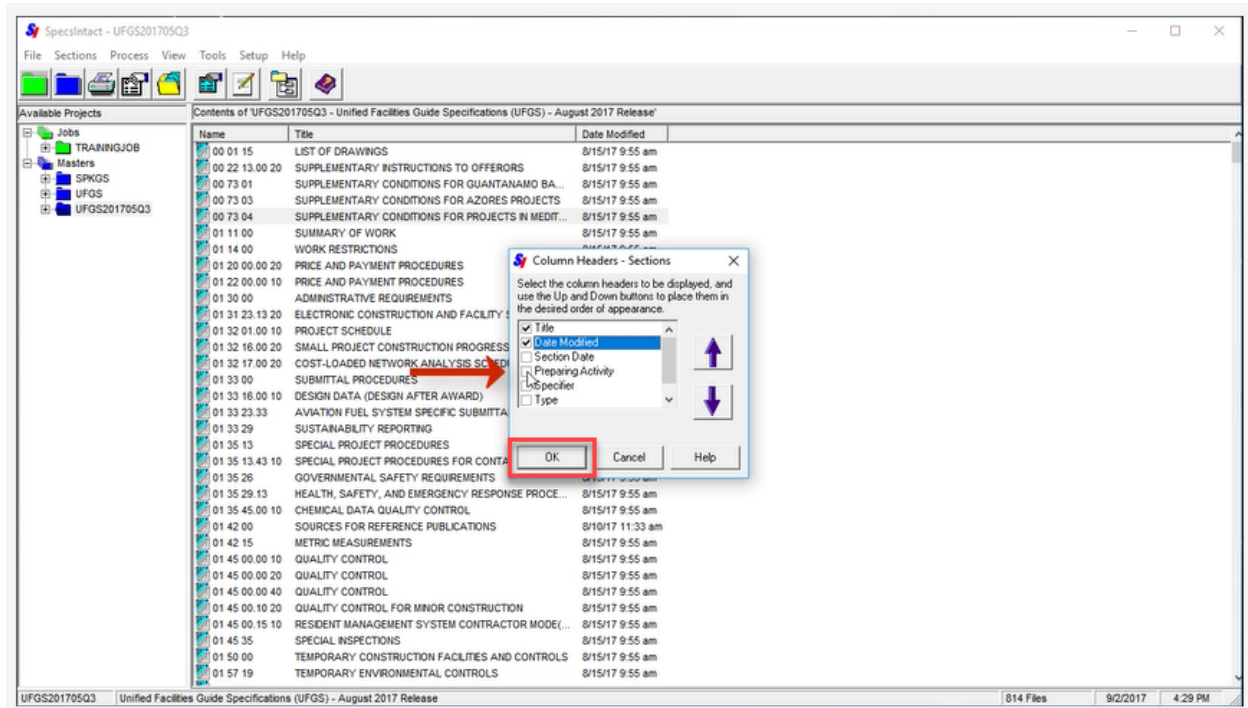
Immediately SpecsIntact will warn you that this view will substantially slow down the display of Sections Files and ask if you want to proceed, let's go ahead and *select* **Yes**.
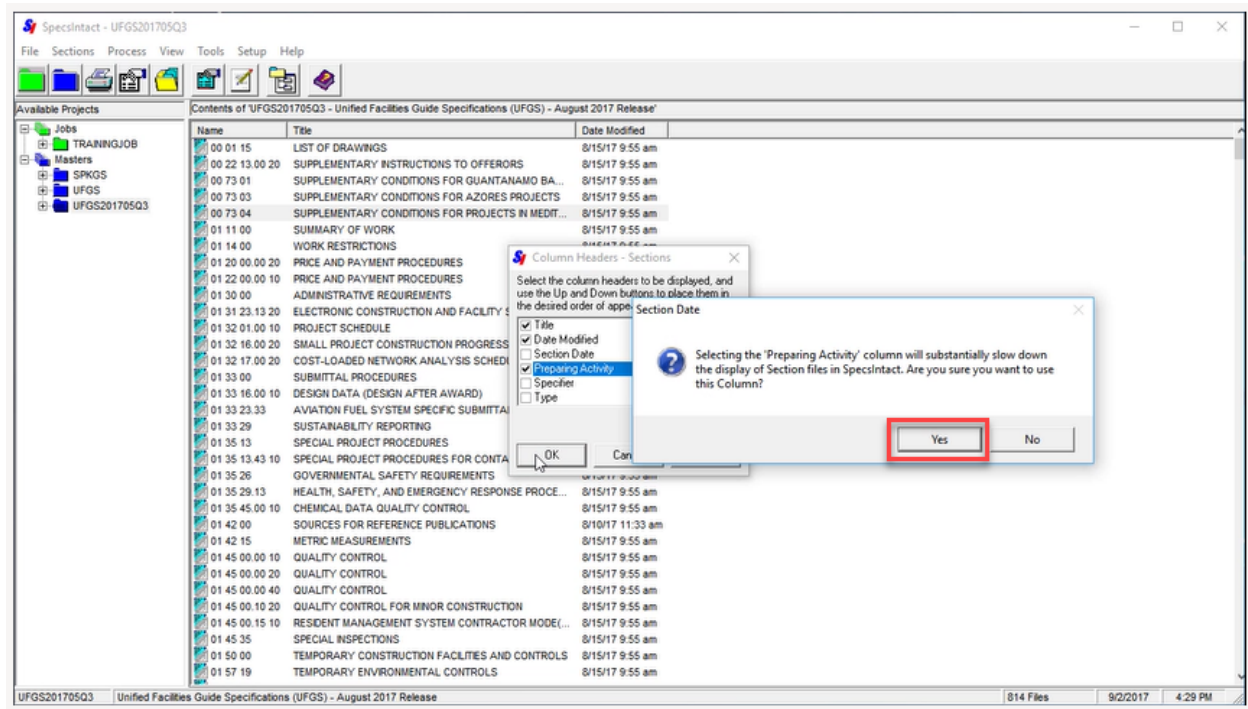

Once you have completed the entire process, we recommend that you reset the Column Headers by unselecting the Preparing Activity to avoid delays when displaying the Sections files. The UFGS Master is a combination of unified, and non-unified agency specific Sections. Each agency is responsible for maintaining both unified and non-unified Sections; therefore, we need to focus strictly on the agency specific fifth level Sections that are unique to each agency. Army specific Sections use 10, Navy 20, Air Force 30 and NASA 40. Since we are customizing this Master for Army, we need to *select* the **Preparing Activity** column to sort the Sections by agency.
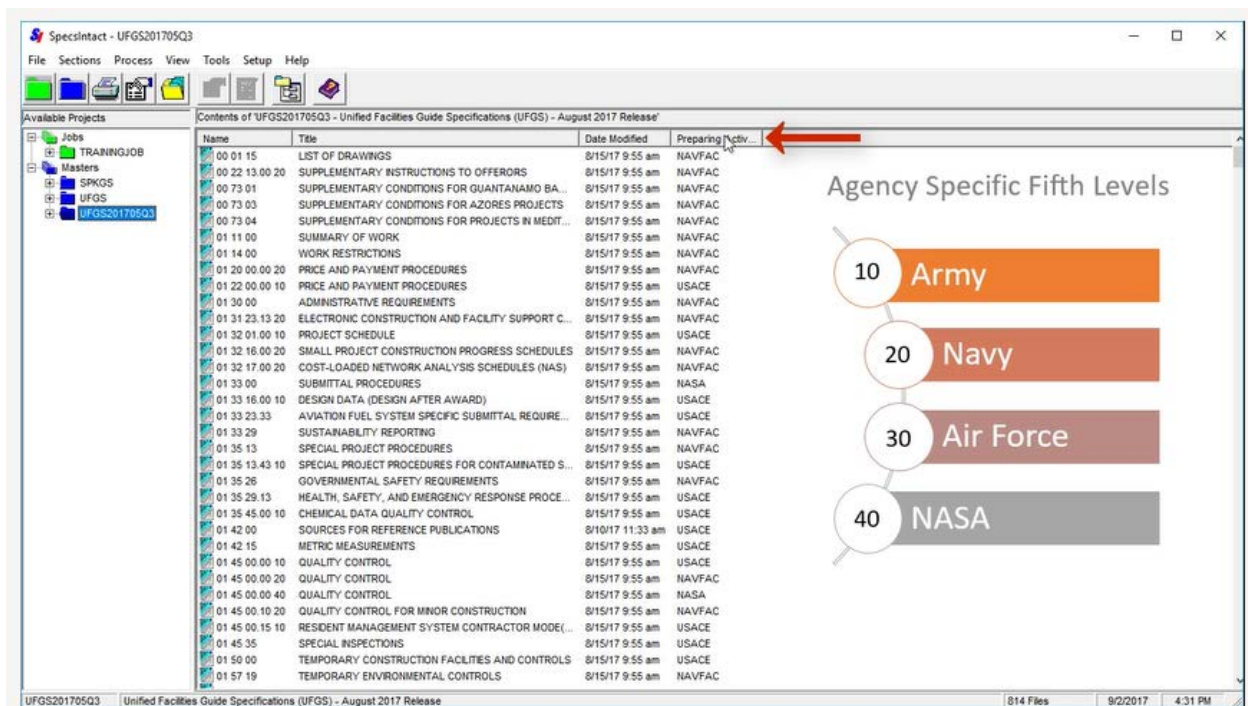
Let's begin deleting the unneeded fifth level Sections. To do this, we will use the *Ctrl key* to **highlight the NASA fifth level Sections**. Now that we have them highlighted, *press* the **delete key**.
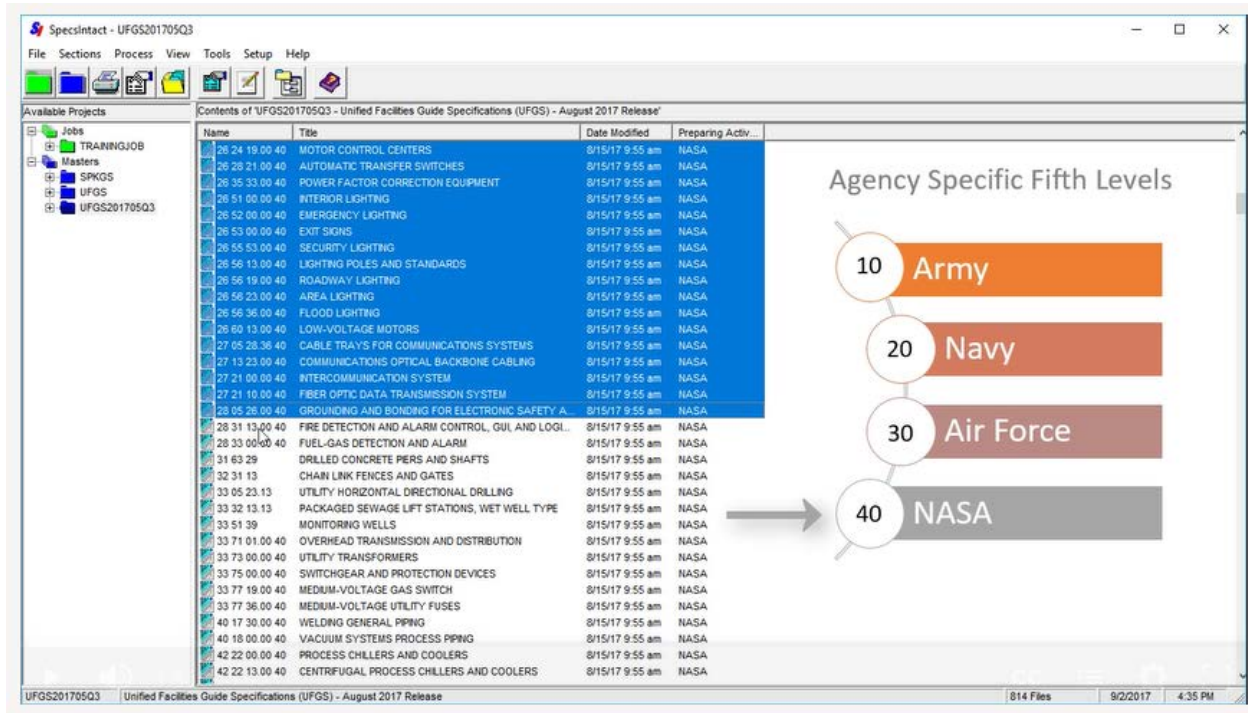

Before selecting OK on the Confirm Selections to delete message, I'd like to share a little trick with you. If you accidently highlighted a Section that you did not intend to delete, you can *click* on a **Section to unselect** it, thereby leaving the Section in the project.
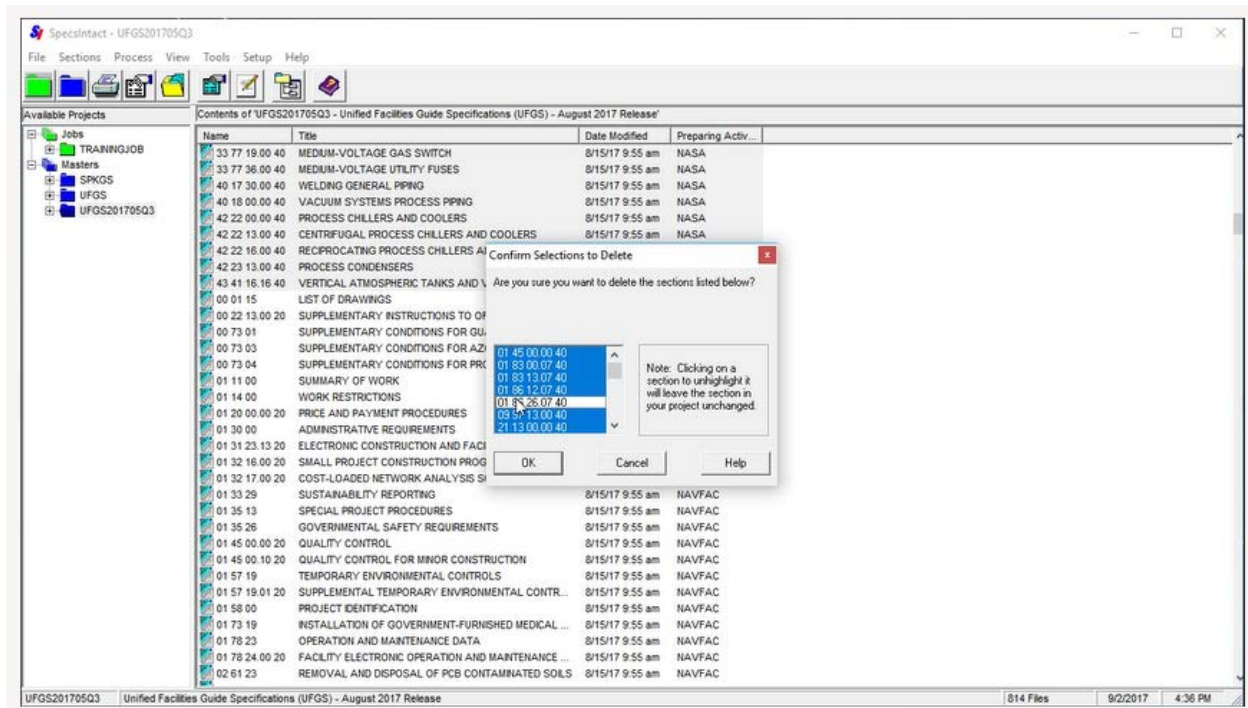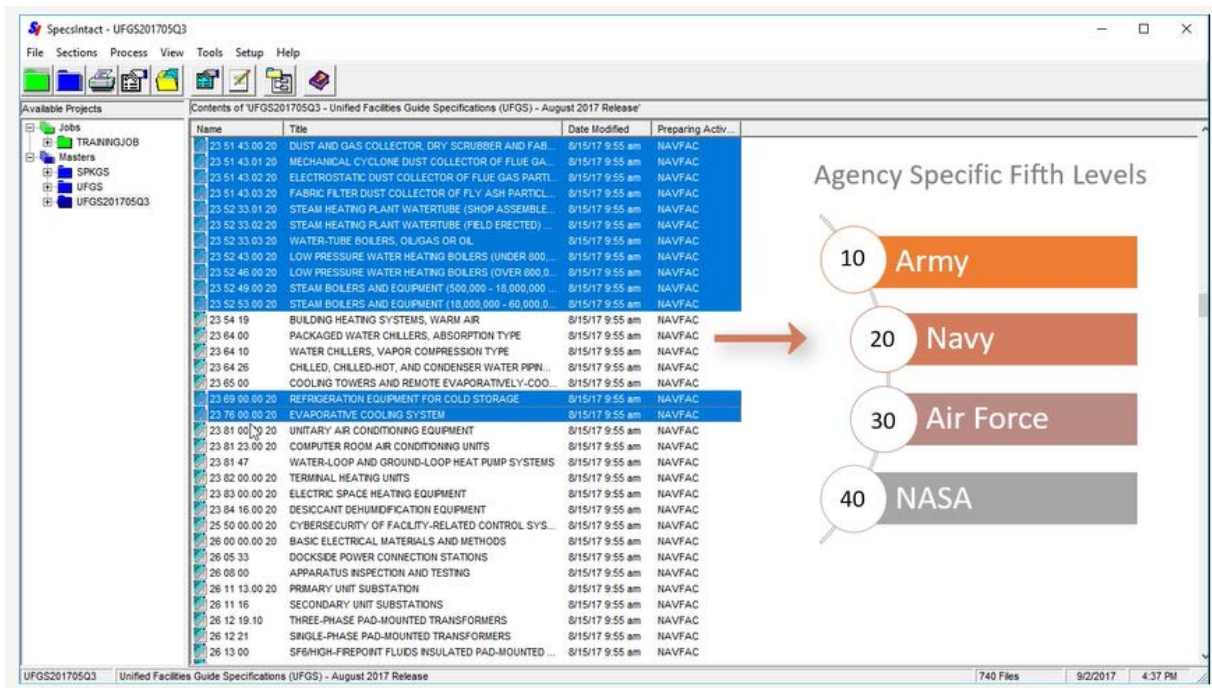
Since I want to delete all of the Sections, I am going to *re-select* it and then *select* **OK**.
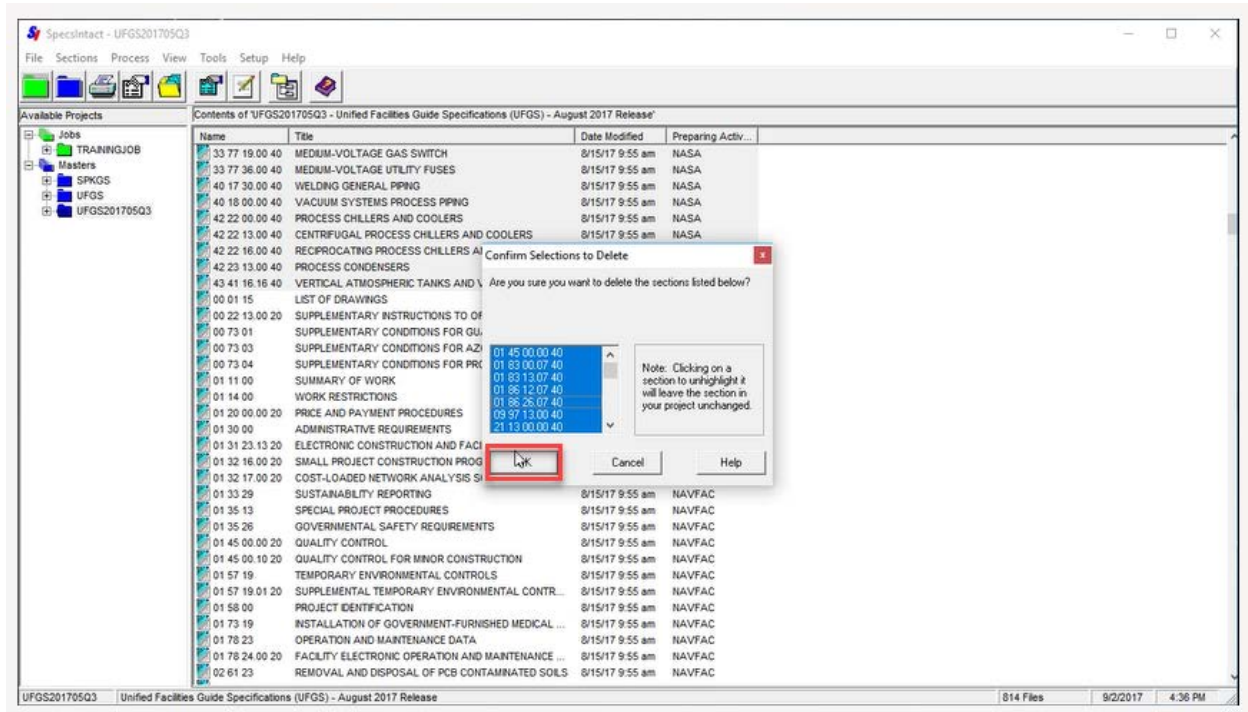
When the confirmation message appears, go ahead and *select* **OK**.
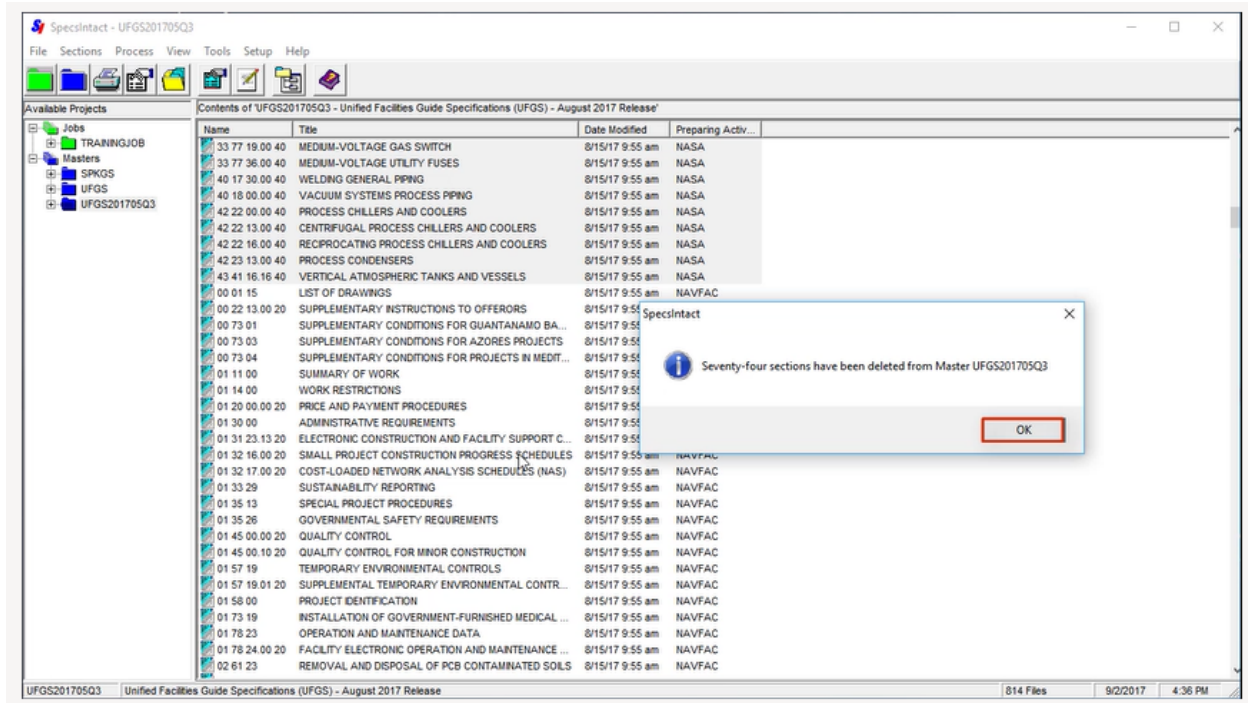
We will then repeat the same steps to delete all of the NAVY fifth level Sections.


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Now that we have deleted all agency specific Sections, it is time to Tailor the Master in order to remove the agency specific Information within the Sections. To Tailor the Master, right-click and select Tailor Master.
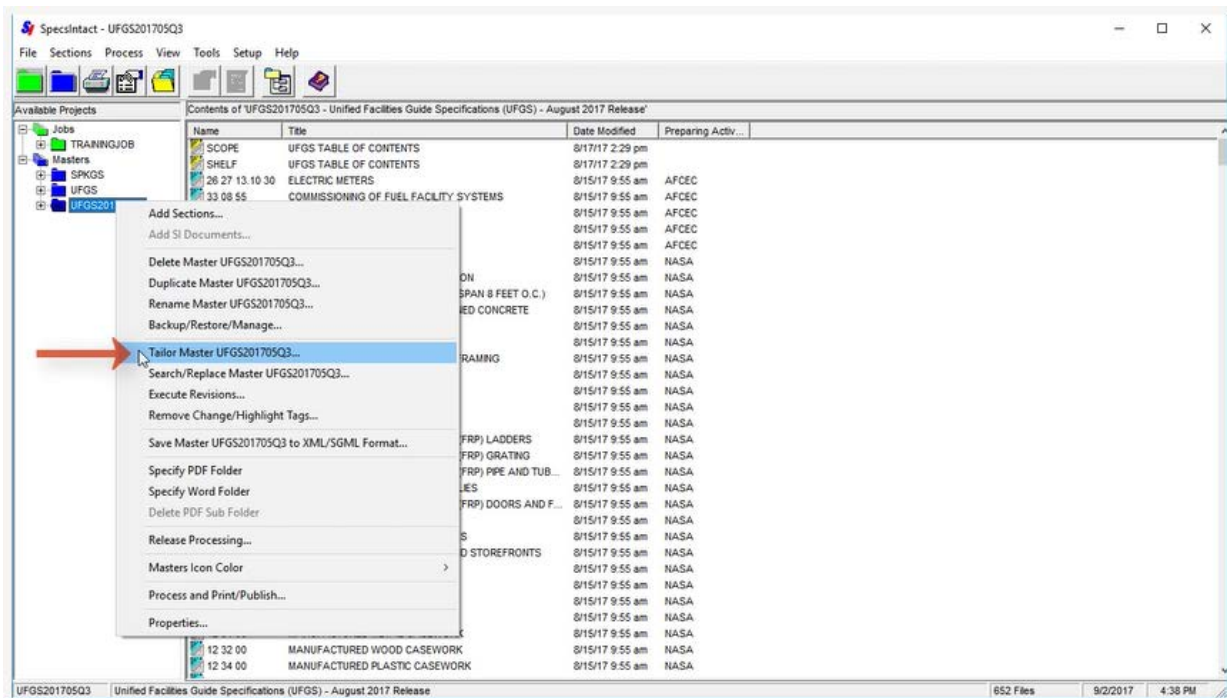
From the Tailor Sections dialog box, you want select "Automatically apply check/uncheck to identical Tailoring Options in all Sections," so you only have to uncheck the Tailored option that is repeated throughout all of the Sections once.
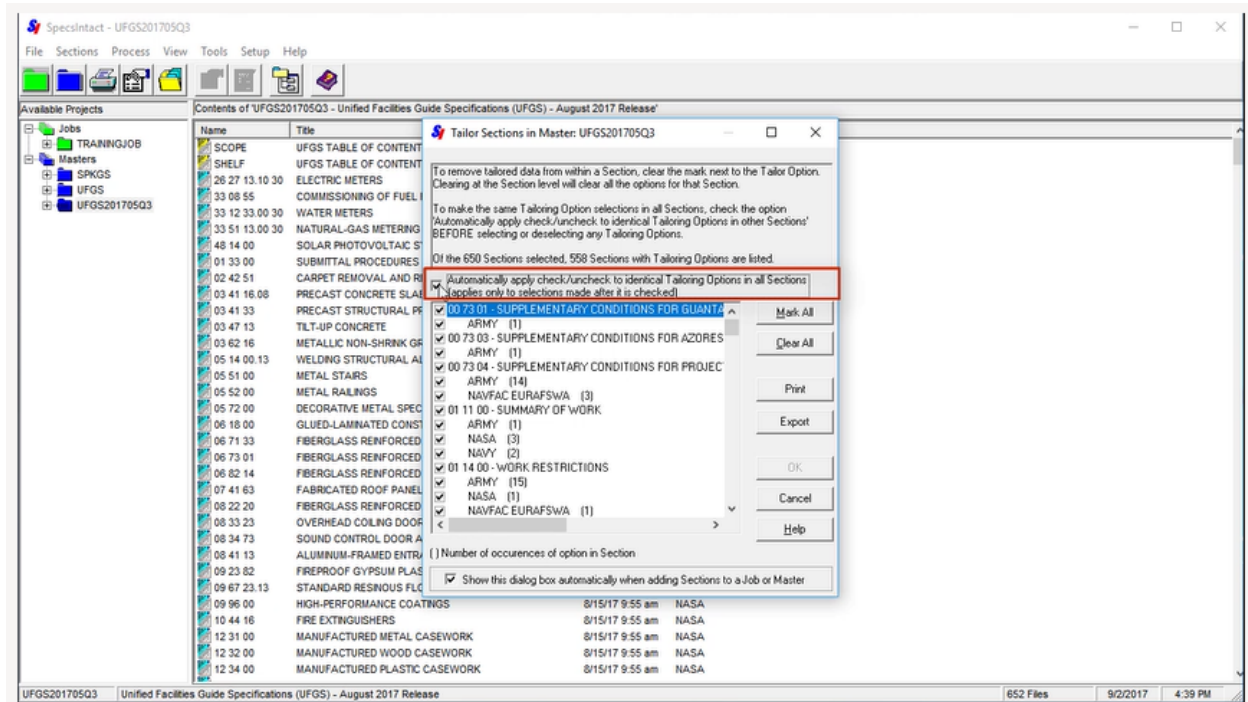

As we go through this phase of the process, Army and Air Force will be the only remaining Agencies.
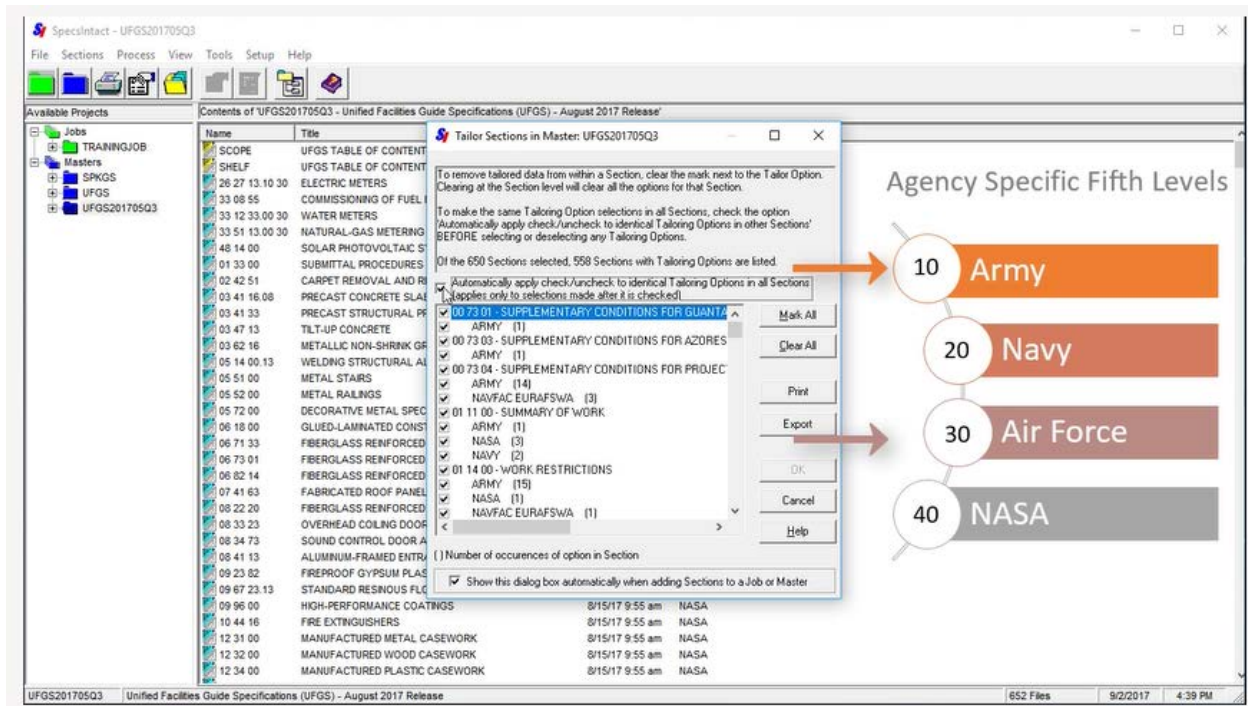
Displayed are the Tailoring Options that the Sacramento District unchecks during this process. Do not solely rely on this list since we add new Tailoring Options on a regular basis. I would like you to pay close attention to the first and last displayed NAVFAC related Tailoring Option, when I uncheck one, the other identical Tailoring Option is unchecked as well.
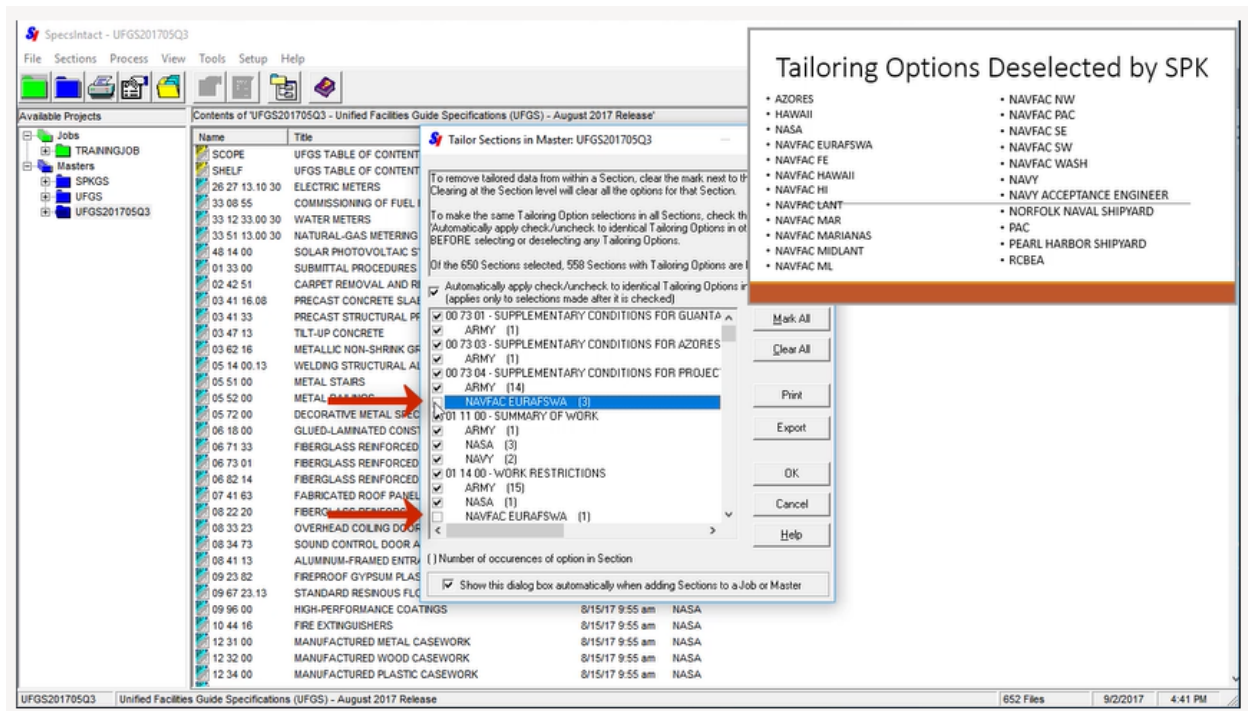
Let's continue by unchecking the other agency specific Tailoring Options. Now that we've unselected the non-applicable agency Tailoring Options, *select* **OK**.
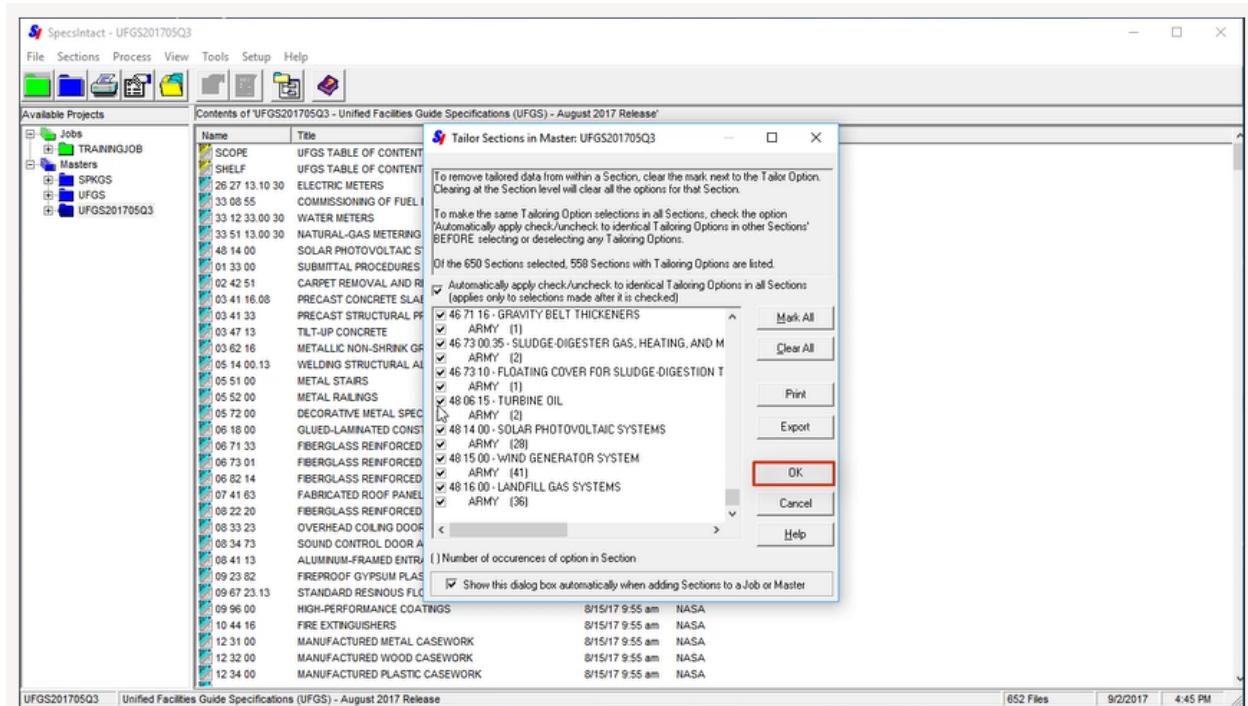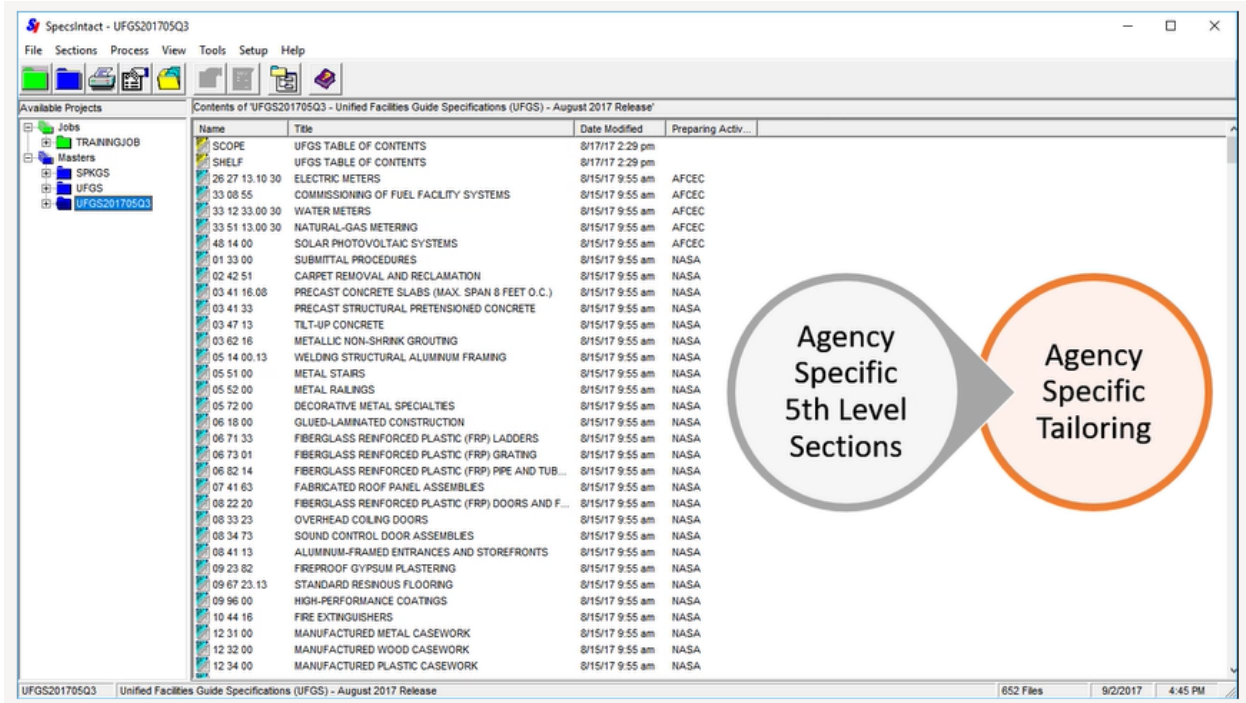
When the confirmation window opens, *select* **OK** again.
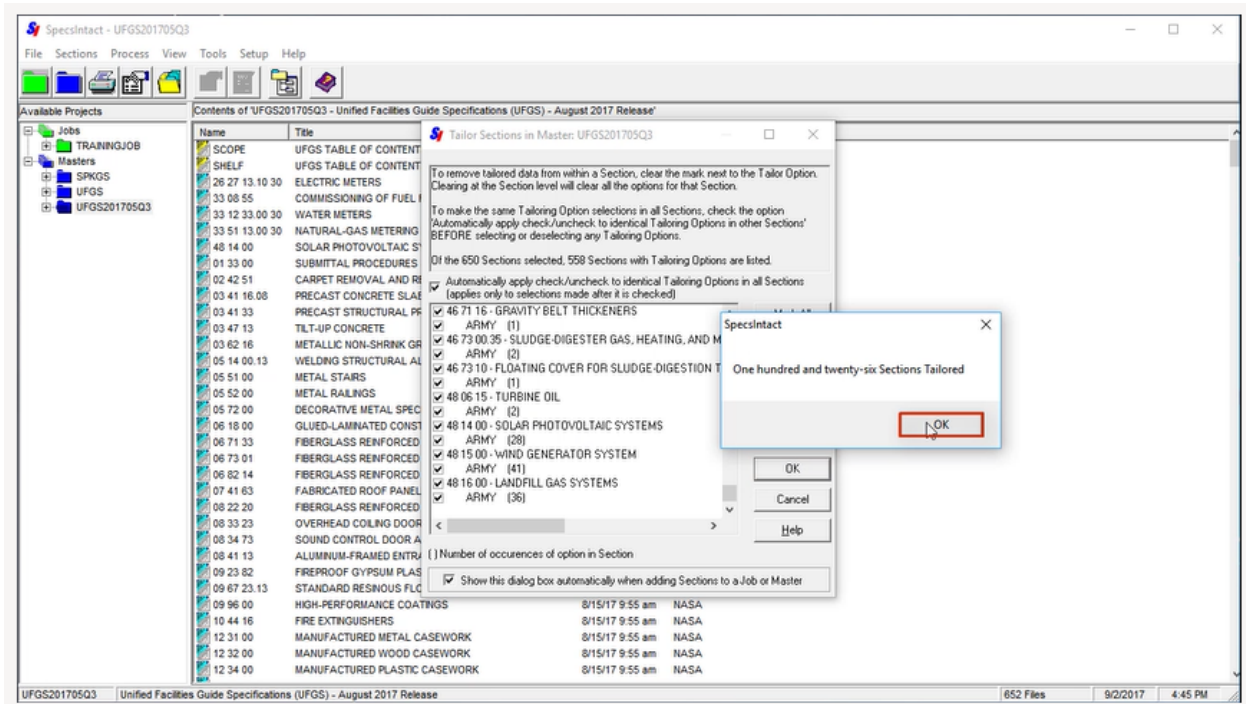

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So far we have removed all agency specific Sections and the agency specific information within the Tailoring Options.

Now it is time to incorporate the Local District Masters. Local Masters are developed to address specific State, County, City, local regulations such as Air boards, Water Quality requirements, Stormwater pollution prevention and local environmental requirements for protecting threatened and endangered local flora and fauna. In addition, the local base and installation requirements are addressed as well. Before we continue, I would like to talk about the Header information in the Local District Masters. These Masters should always have their own distinctive Headers. The SPK District modified the Header by replacing the prefix in front of the Section Numbers with SPKGS.
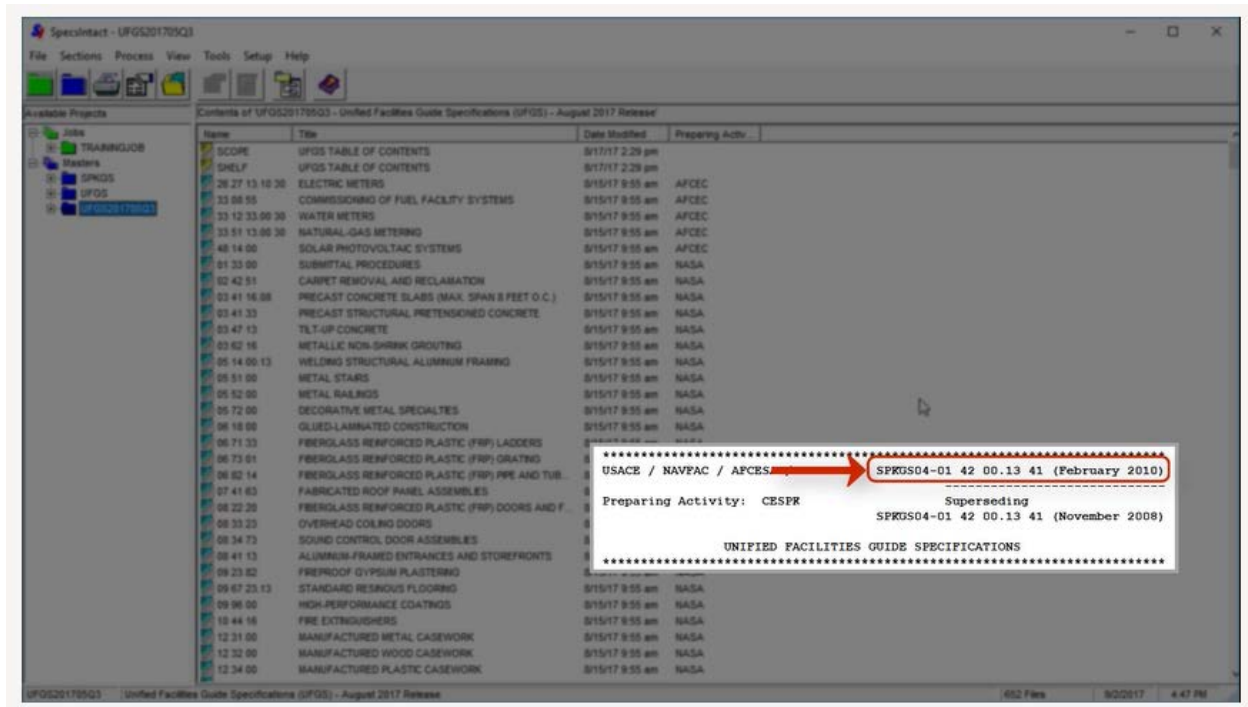

Then updated the Preparing Activity to CESPK.
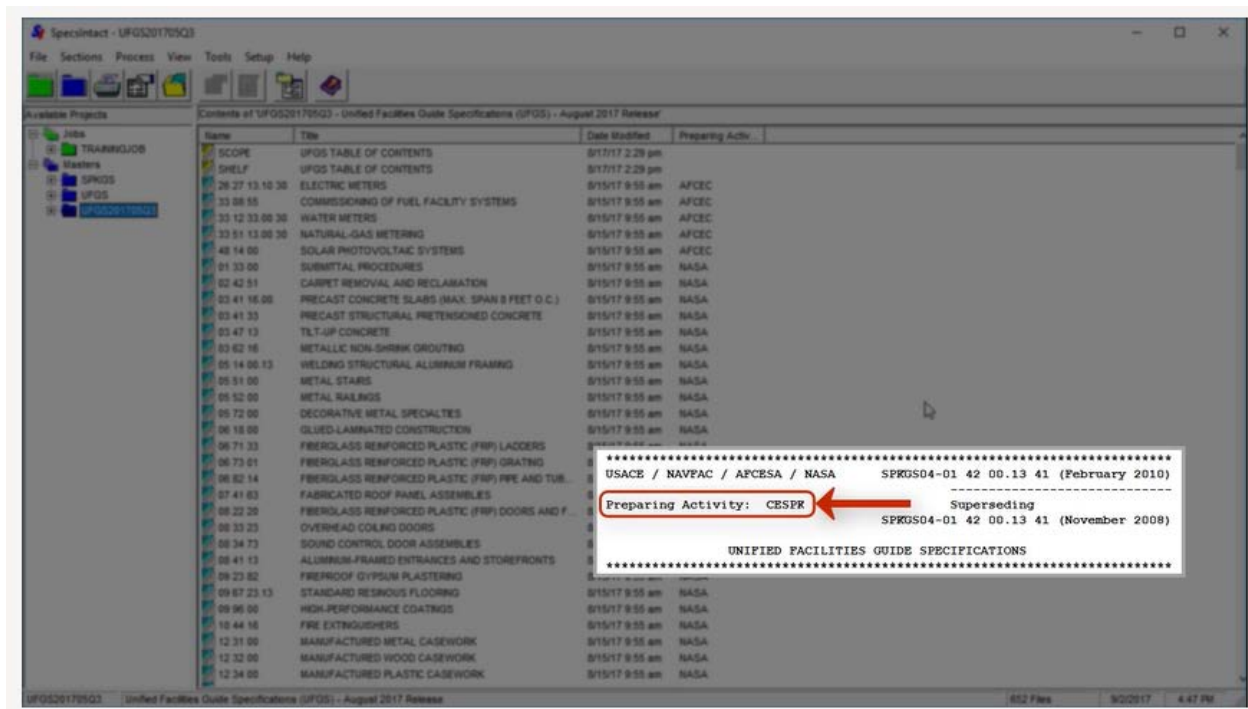
Along with the fifth level designation, the modification to the Preparing Activity is key to this process, so before you continue, please make sure you have updated this information in your Local Masters.
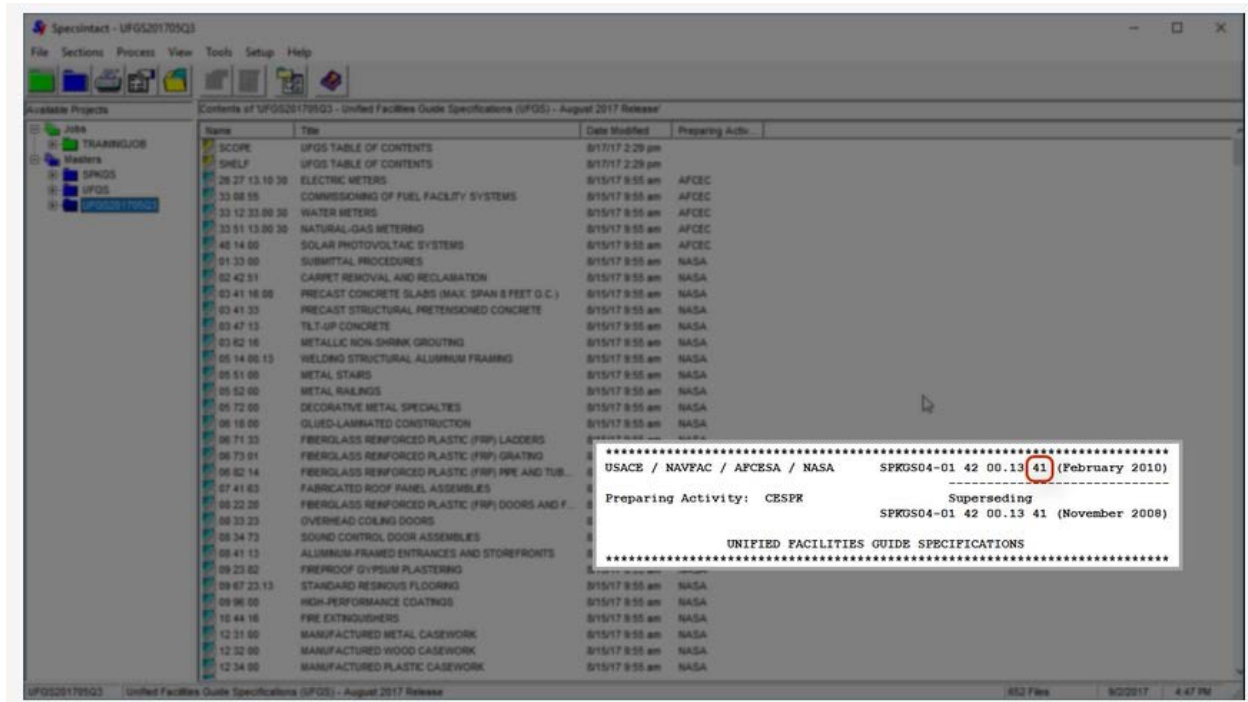

As we examine the SPK District Master, you will see the all but one Section has the fifth level designation 41, which is the assigned number for the Sacramento District.
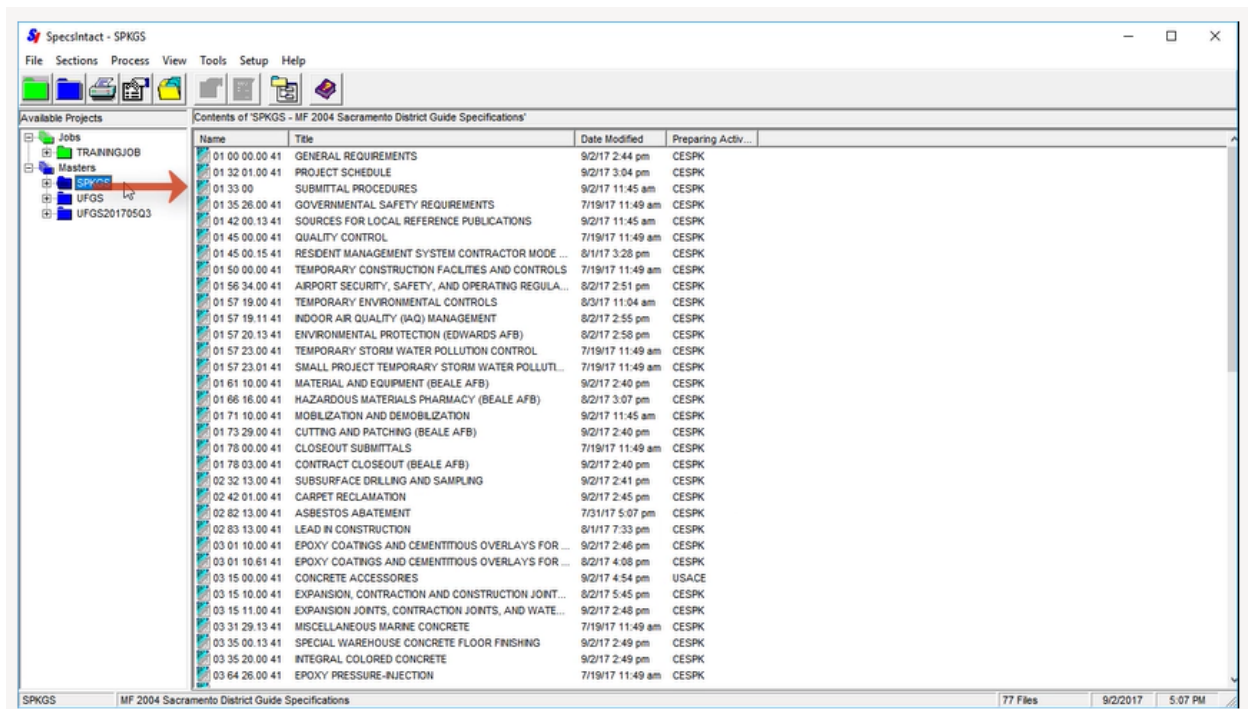
We are now going incorporate the Sections into the Custom UFGS Master. Let's start by highlighting the unique Sections. Since there are some intermingled Sections within the Master, I'm going to use the **Ctrl key** to *highlight* the **first two Sections**, and continue to *hold* the **Ctrl Key**, so that I can drag it into my Custom UFGS Master.
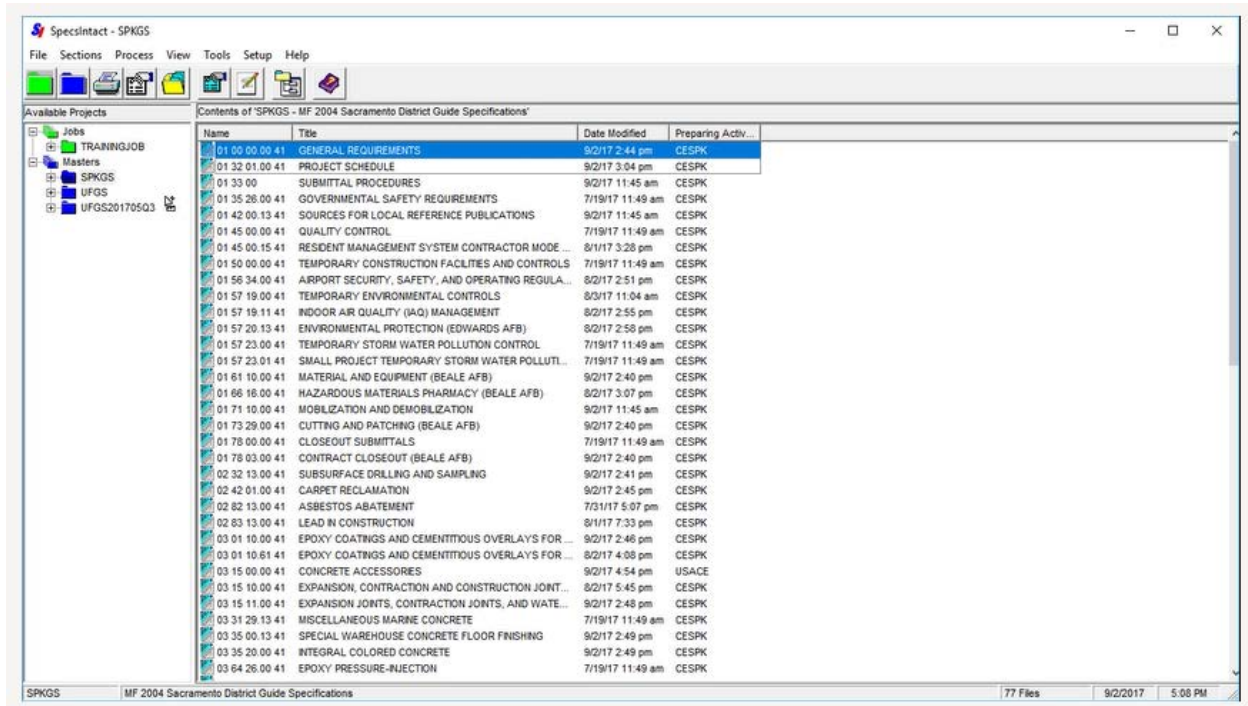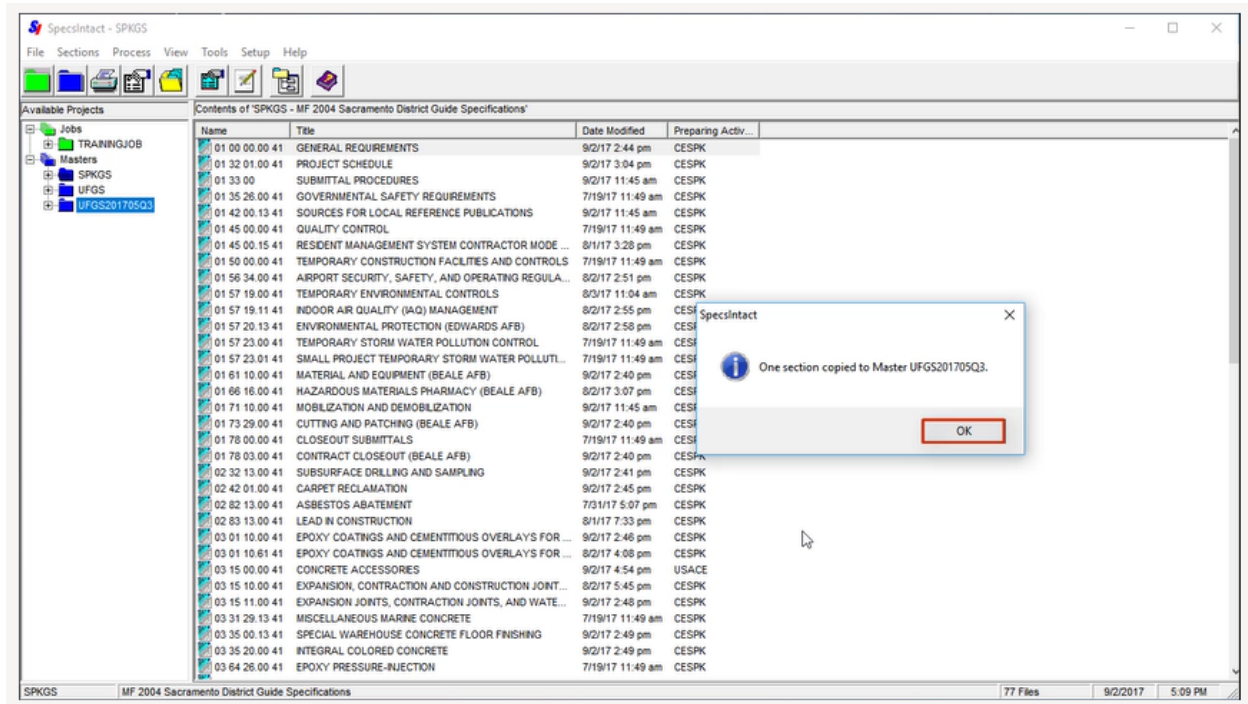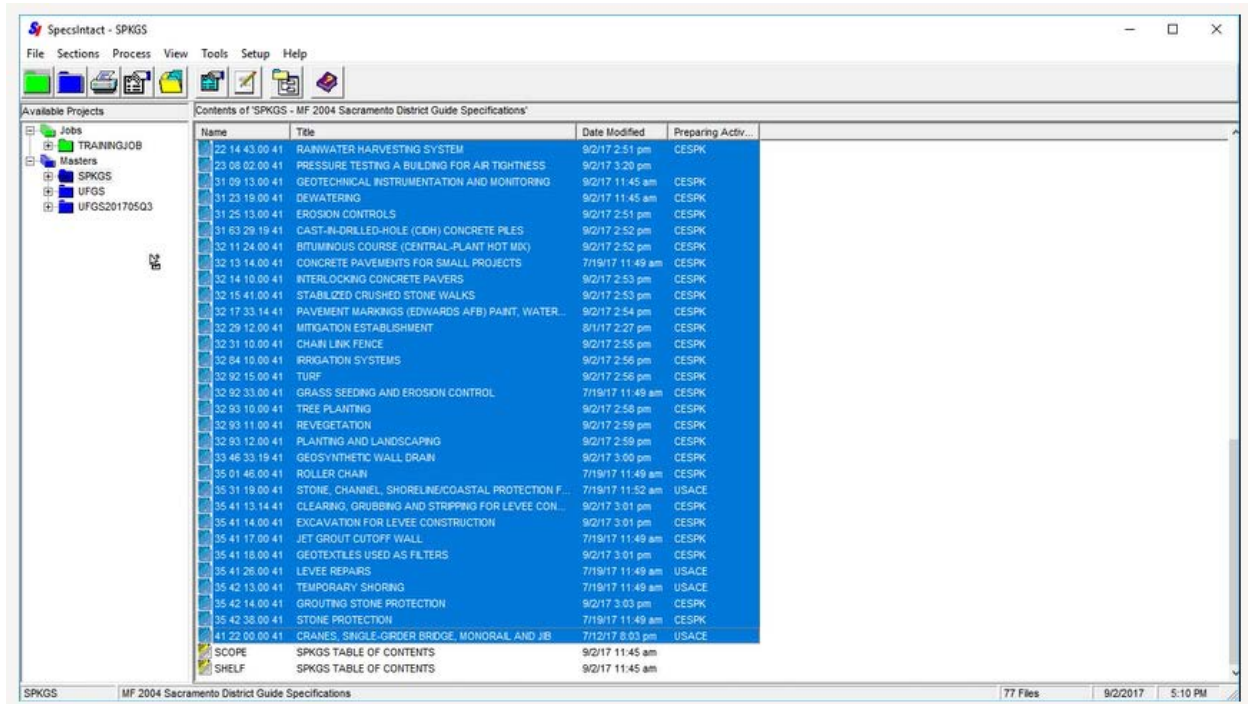

When the confirmation window opens, *select* **Yes**.
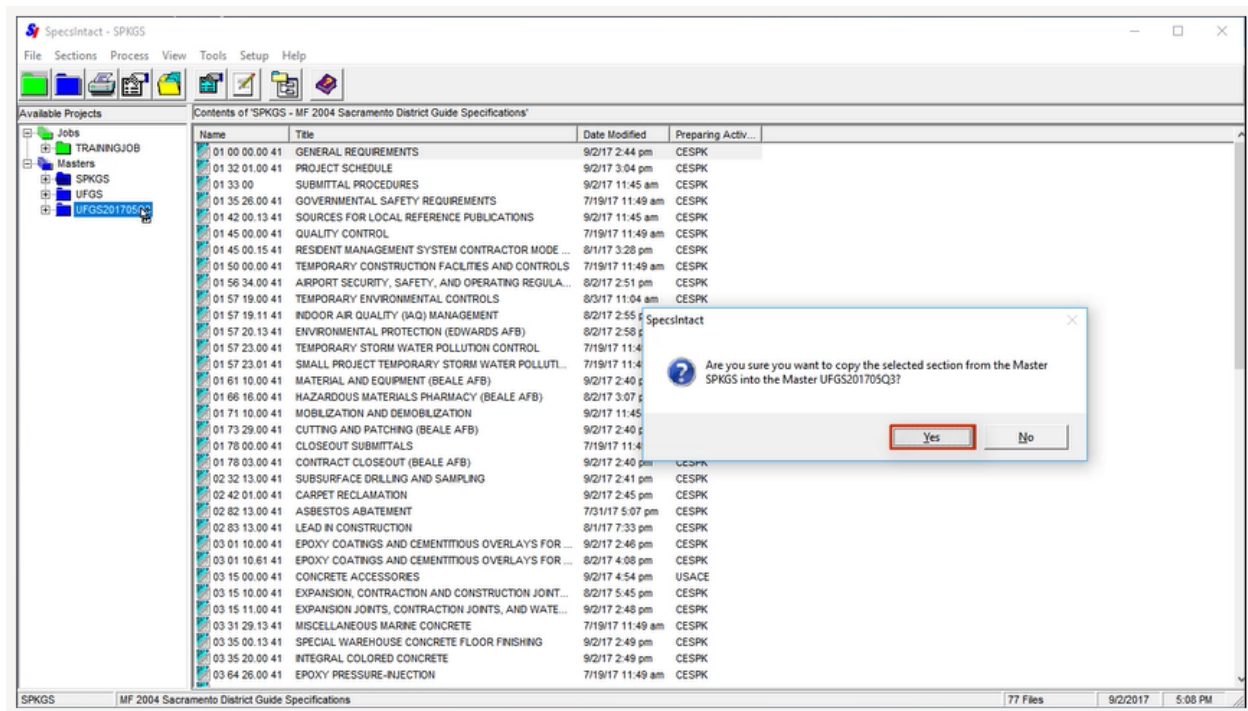
Once all of the Sections have been added, the Tailor New Sections window opens. Since we have previously completed this step, let's go ahead and *select* **Continue**.
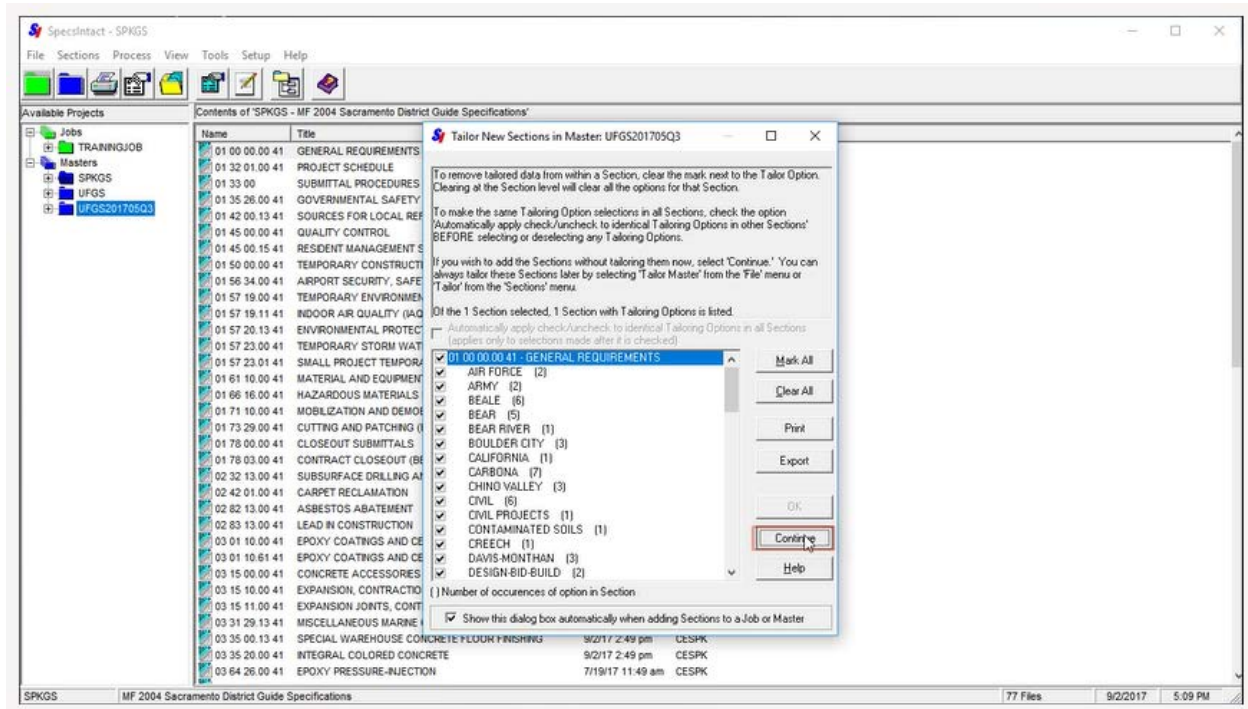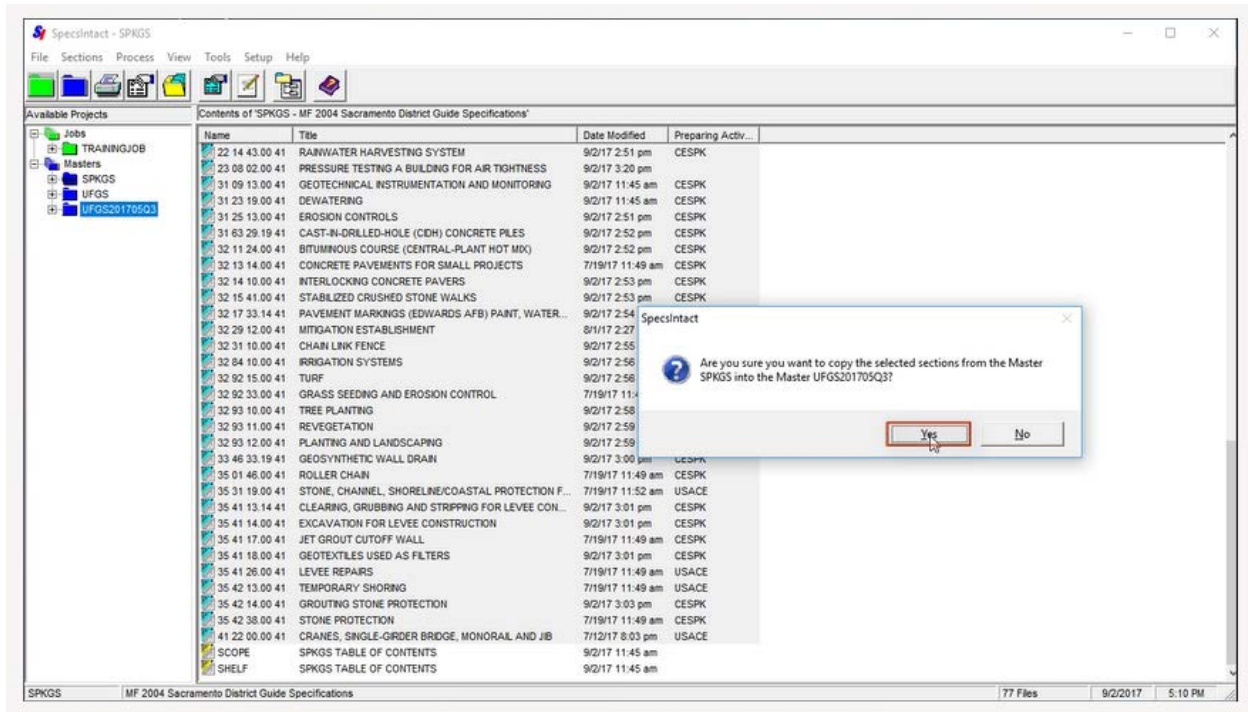

As soon as the confirmation message appears, *select* **OK**.

Now let's *highlight* the remaining **Sections**. Remember when you *hold* the **Shift Key** to continue holding it down so you can *left click* and *drag it* to the **Custom UFGS Master**.
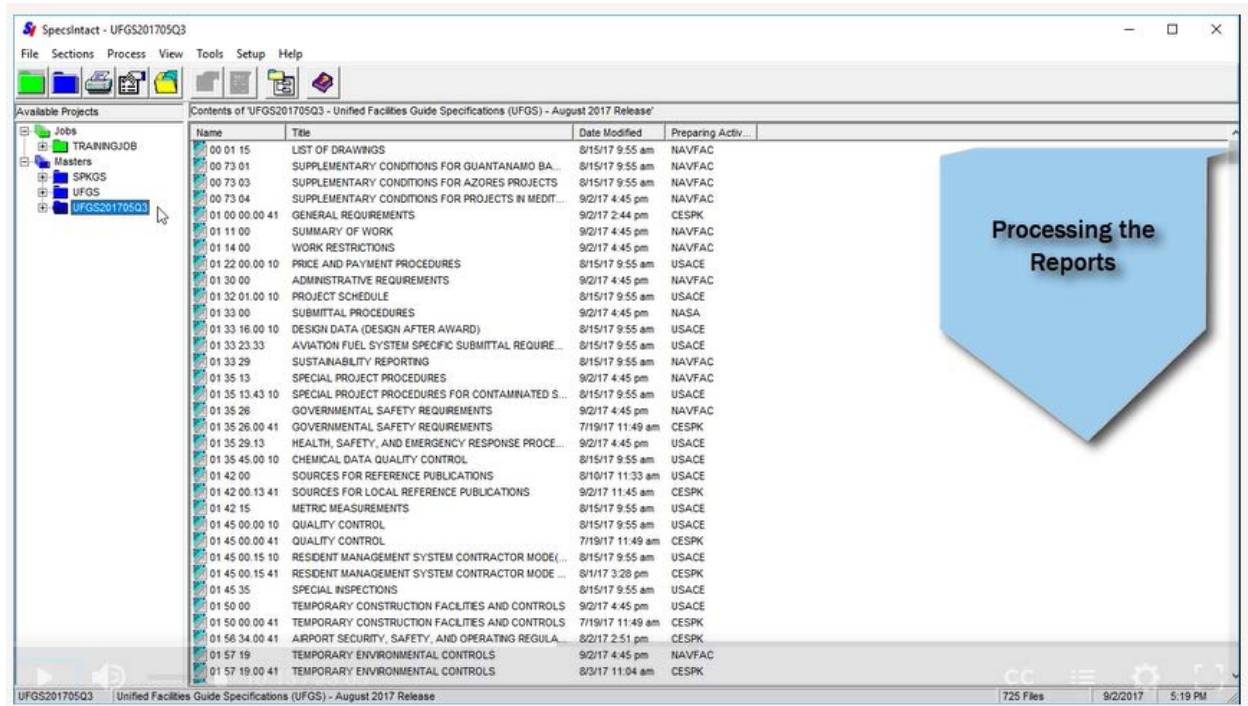

When the confirmation window opens, *select* **Yes**.

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The next step in this process is to process the Master in order to cleanup any issues that arose from combining the UFGS Master with the District Master.


If you need to familiarize yourself with correcting the Verification Reports, review Chapter 6 of the QuickStart Guide and/or watch the Chapter 6 eLearning Modules.
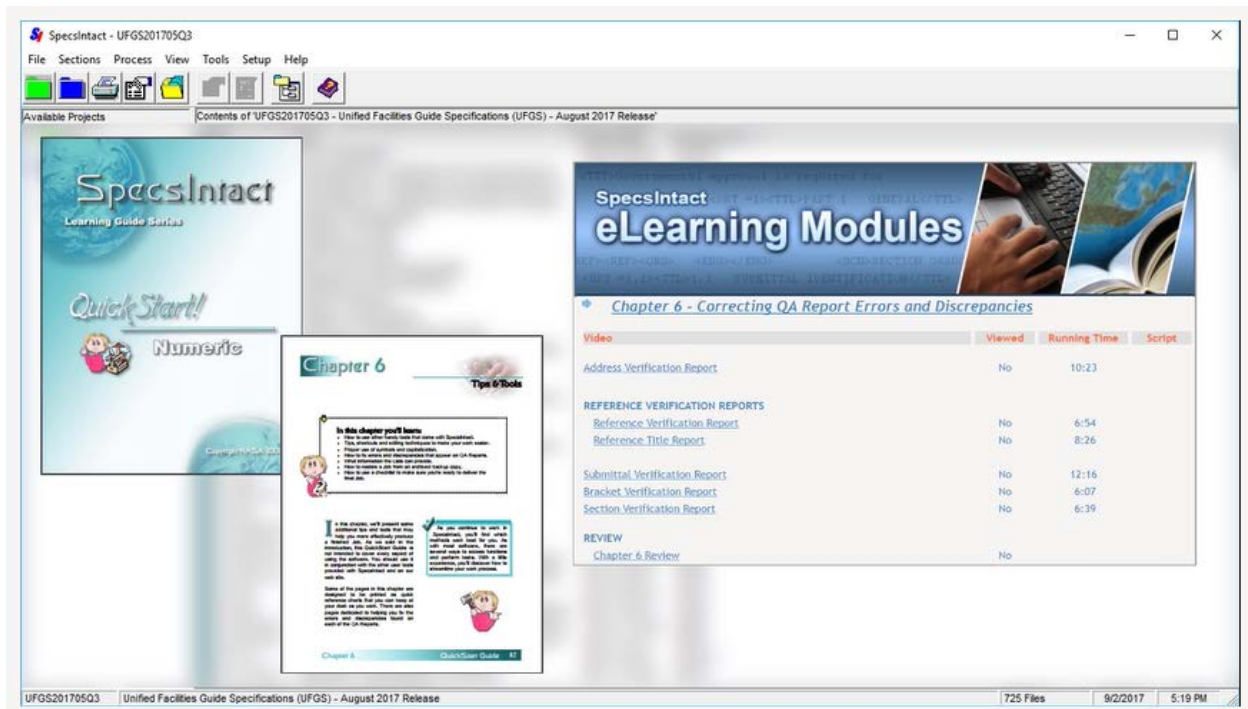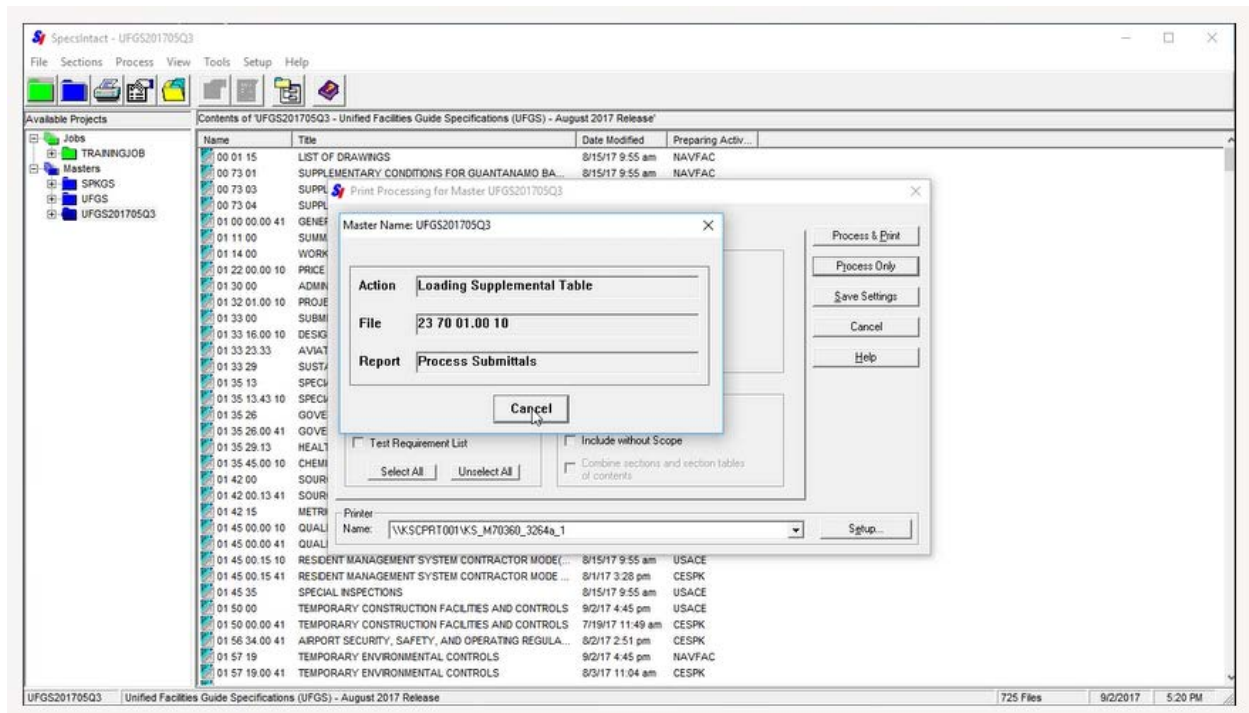
Let's continue with generating the Reports by *selecting* the **Process and Print button** on the Explorer's Toolbar. On the Sections tab, verify All Sections is selected.
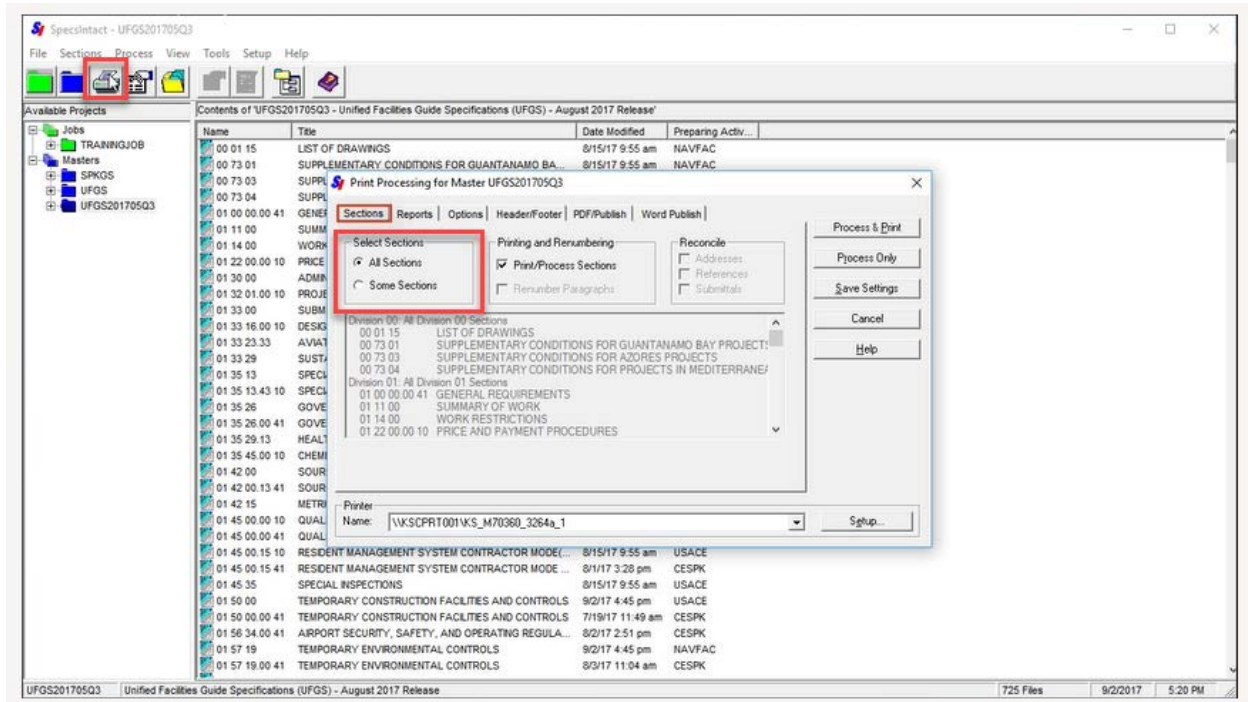

Select the **Reports Tab** to verify that all of the Verification Reports are selected. *Click* the **Process Only button**.
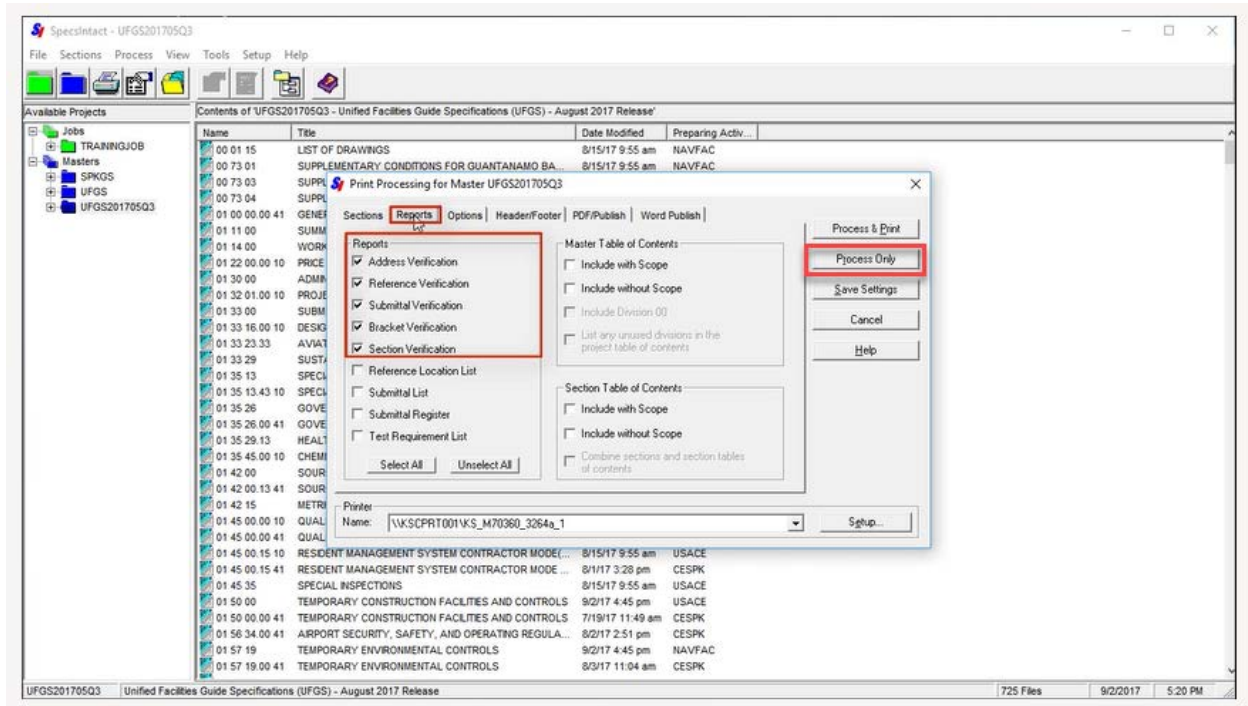
Due to the size of this Master, it will take a few minutes to process.

At this particular phase of the project, you should only focus on correcting the issues found in the Reference Title and Submittal Verification Reports. I will briefly point out what the issues are and what you need to do to correct them. On the Reference Title Report, you will see that Reference Title found in Section 03 31 29.13 41 reflects a different date from those in the other Sections. Once you have corrected this particular Reference Title and regenerated the Reports, all errors will be resolved.
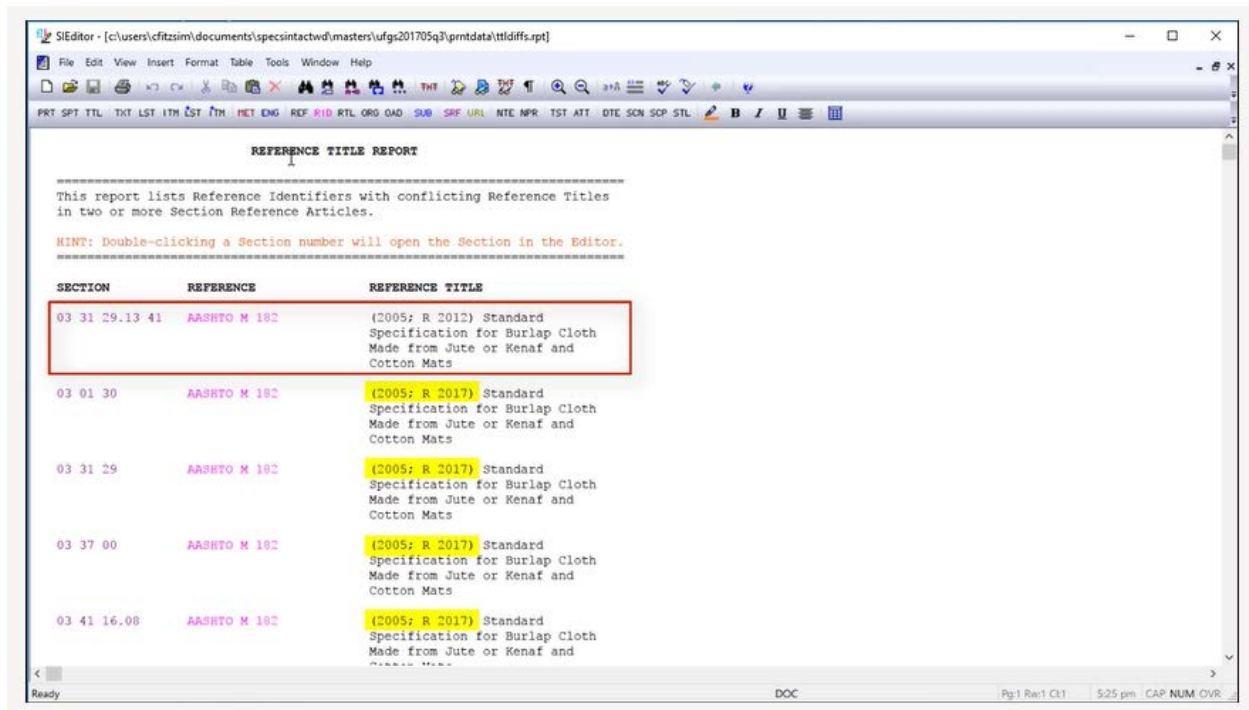
Now let us focus on the issues found on the Submittal Verification Report! As you see, the majority of the issues reflect, "was not found outside the Submittal Article," which are a direct result of Tailoring the Master to remove the other agencies Tailoring Options. In order to correct these errors, you will need to delete them from the Submittal Article.
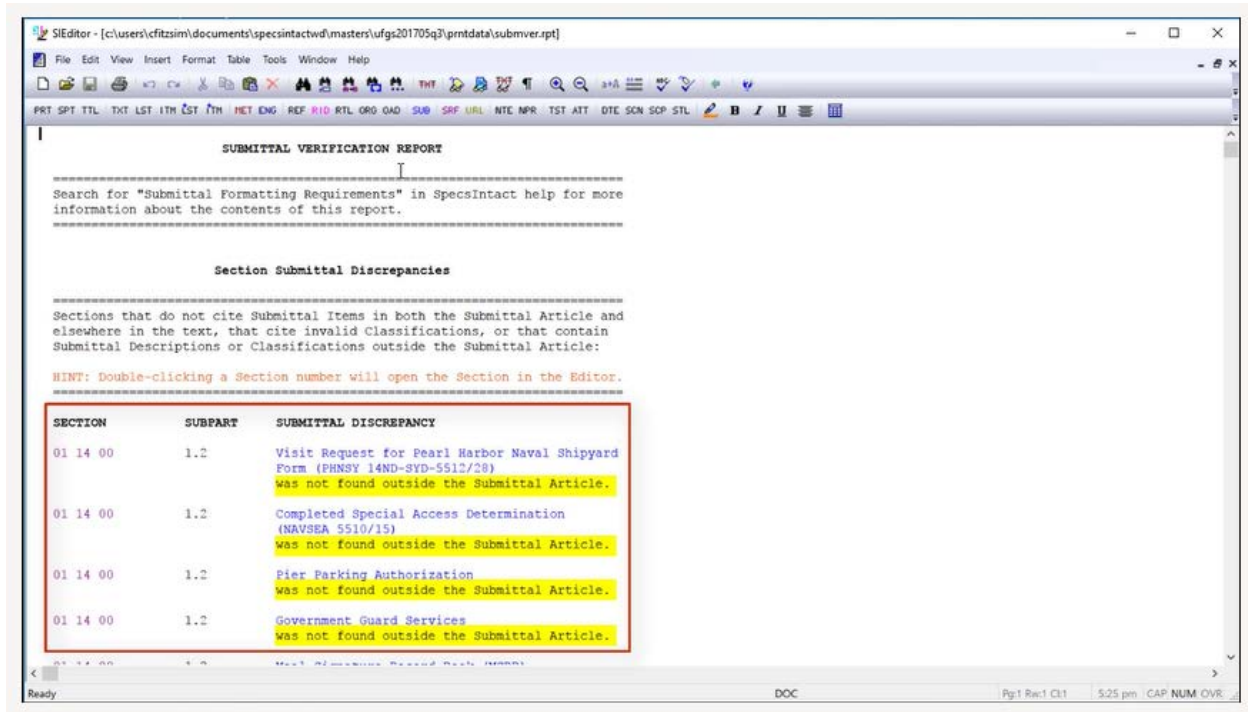

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The next phase of this process is more detailed, as you will need to compare the Local Master Sections with the changed UFGS Sections. In order to do this, you will need the latest copy of the UFGS Changes and Revisions document to determine what Sections require updating.
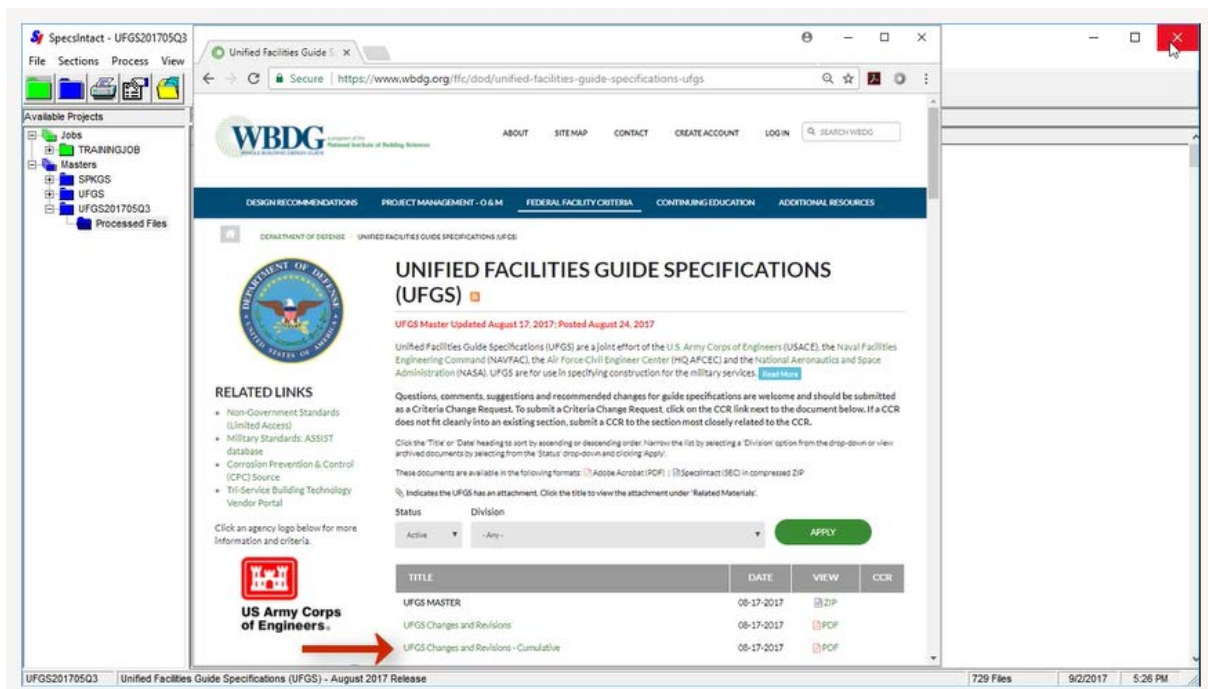
If changes are minor, you will update the Sections in the Local Master, if they are major, then you will revise the UFGS Sections to include the local requirements. A link to this document is available on the SpecsIntact Website Masters Page or you can download the file directly from the Whole Building Design Guides (WBDG) UFGS Page.
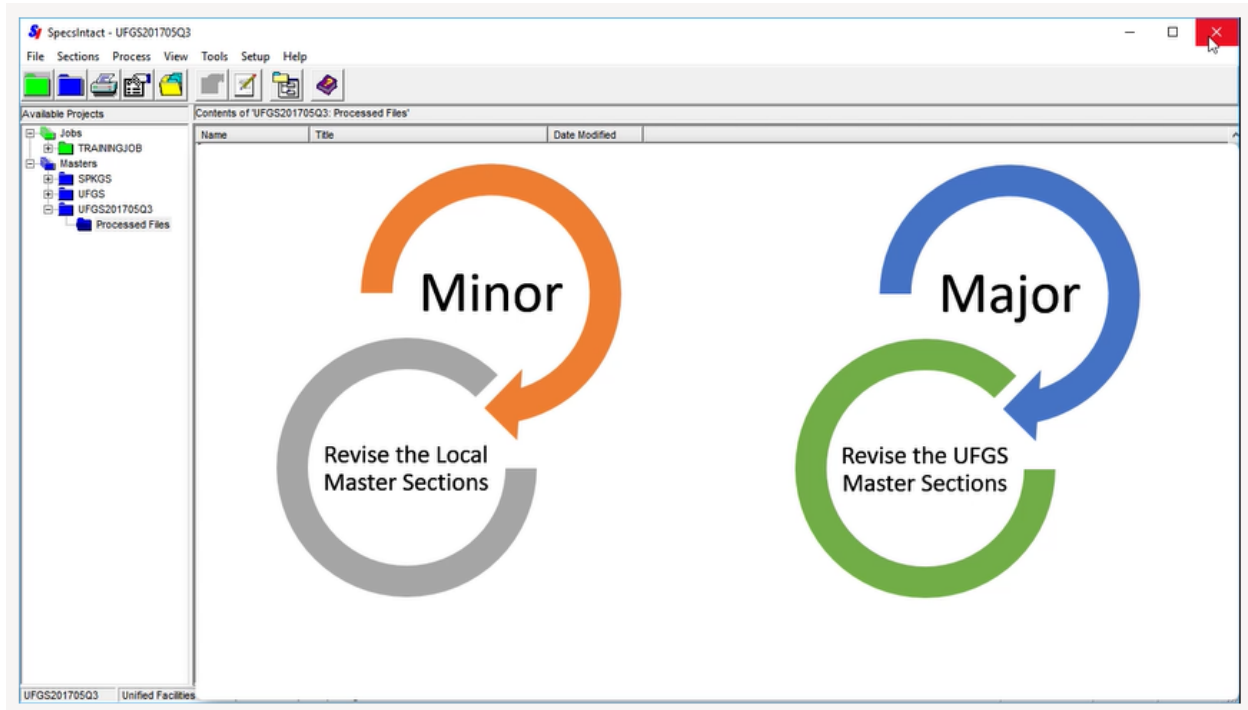

The fastest way to compare and edit the Section files is to open both the District (Local) Master Section and the UFGS Section in a single instance of the SI Editor and select Window | Tile Vertical. This will display them side-by-side with the Navigation Pane on the left. Before you start, make sure to close the Navigator in both Sections so you can see more text.
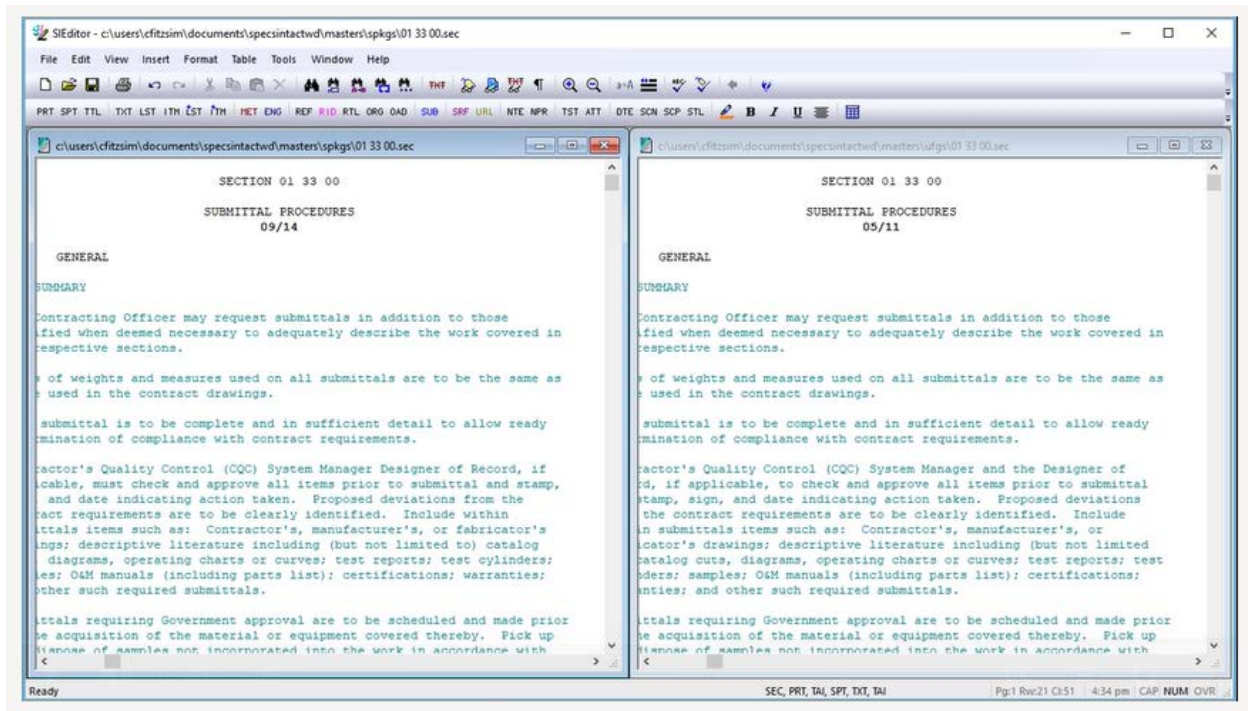
Look at the right side of each file and you can see the "Ragged Edge" pattern effect. You do not have to read the entire line to detect changes, but it is only necessary to check the words at the end when you see a difference in the patterns. Then read that line to find what was changed and update the Local District Master Section. Continue to page through both Sections and make any needed changes until done. This method may not detect minor changes to a word or measurement, but will be close.
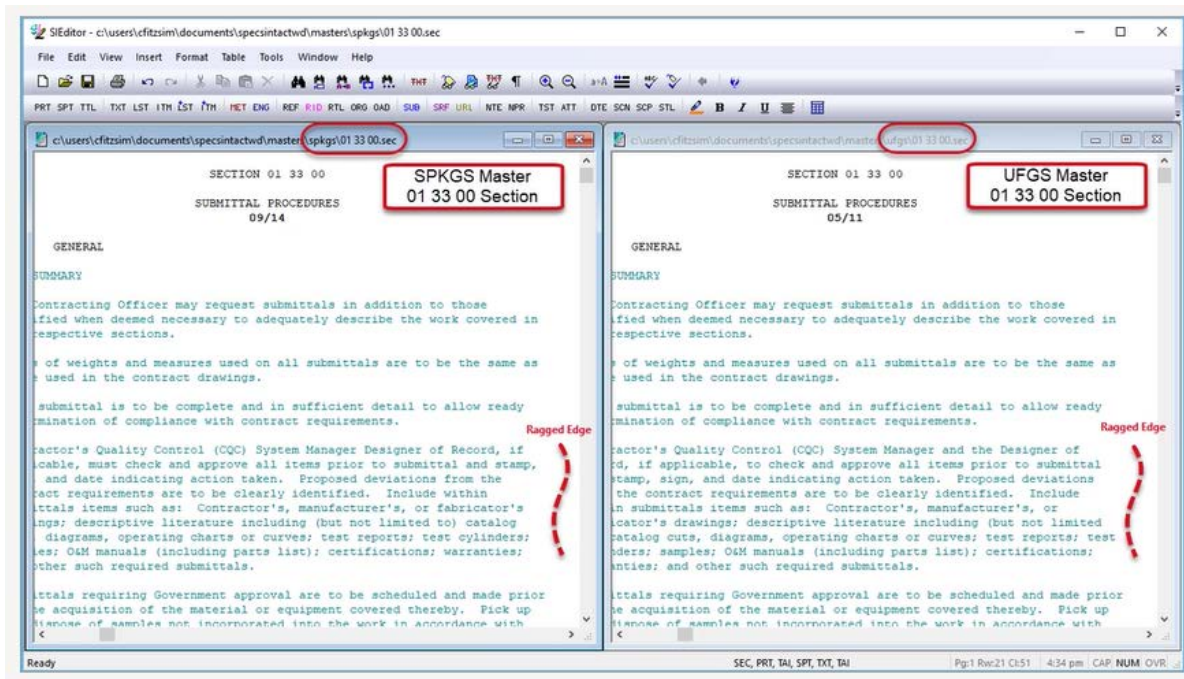

There are other ways to compare the Section files, but they provide more detail and take a little more time. First, you will need to Publish the Sections to either PDF or Word using SpecsIntact's Process and Print/Publish feature. Then you can use Adobe Acrobat or Microsoft Word's built-in comparison tools that will assist you in identifying the changes in the UFGS Sections that require your attention. Although the "Ragged Edge" method seems to be faster, these methods tend to be more accurate, so it is up to you to determine what method is best for you!
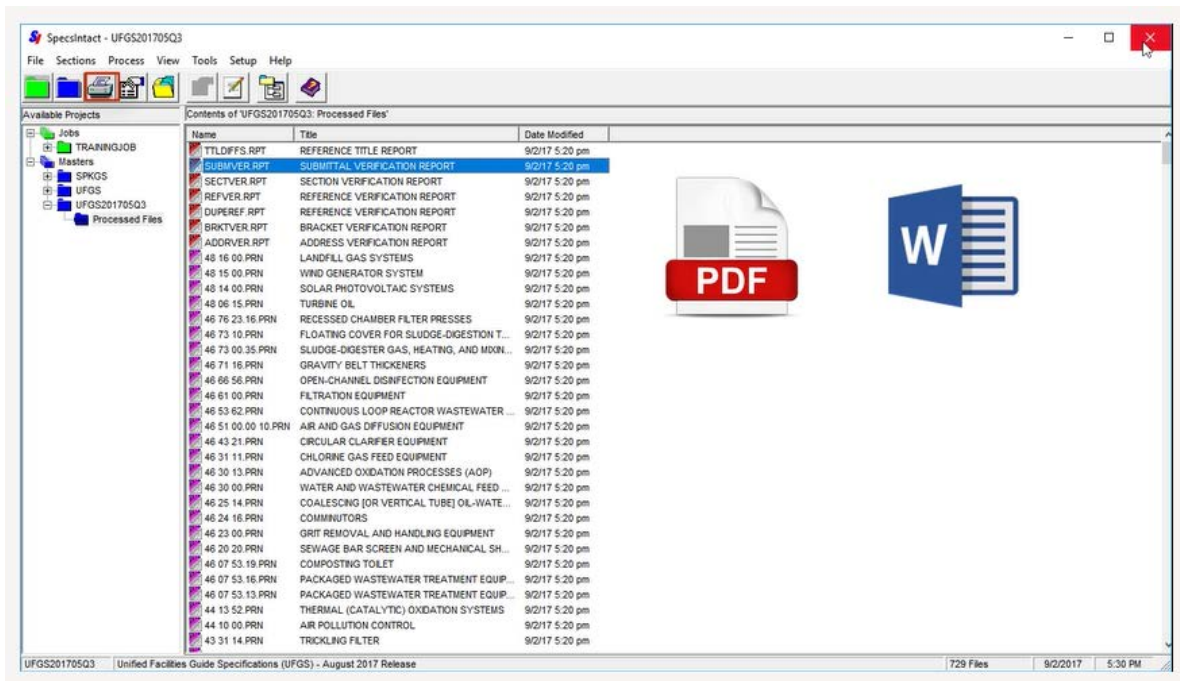
We suggest that you begin by comparing the Local Master 01 33 00 Section
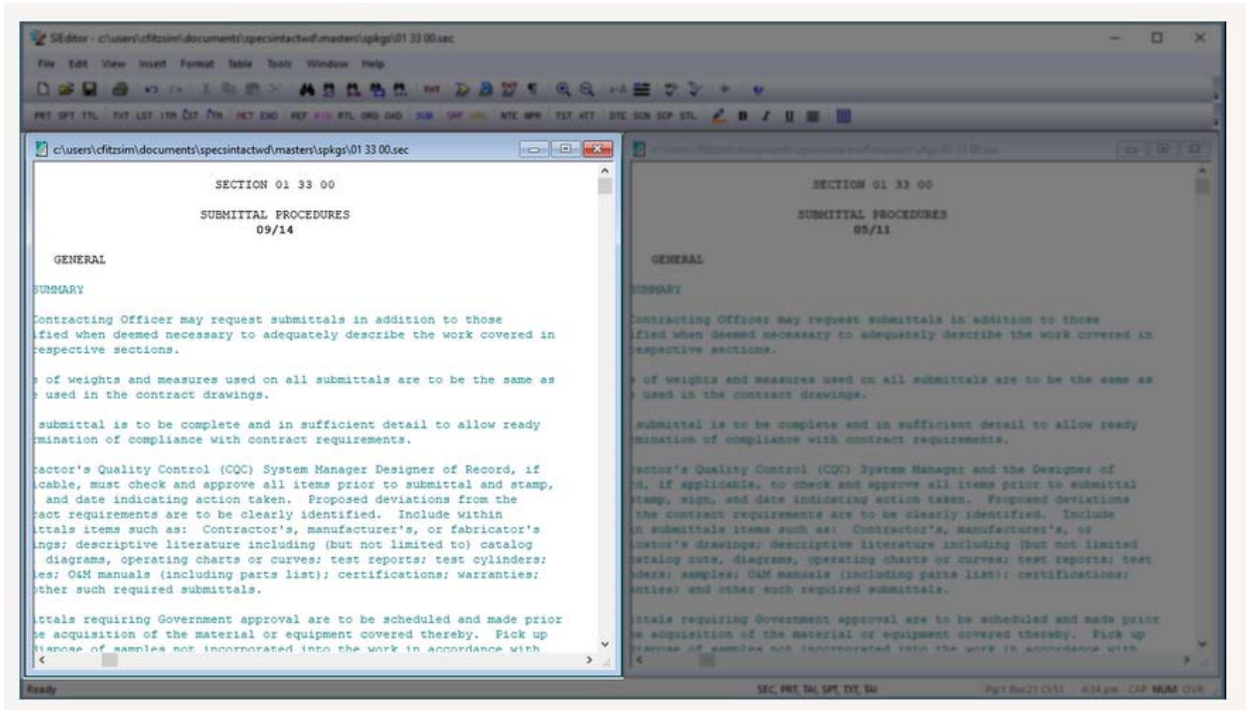
with the UFGS 01 33 00 Section, in order locate the changes and incorporate them into the Local District Master's 01 33 00 Section.
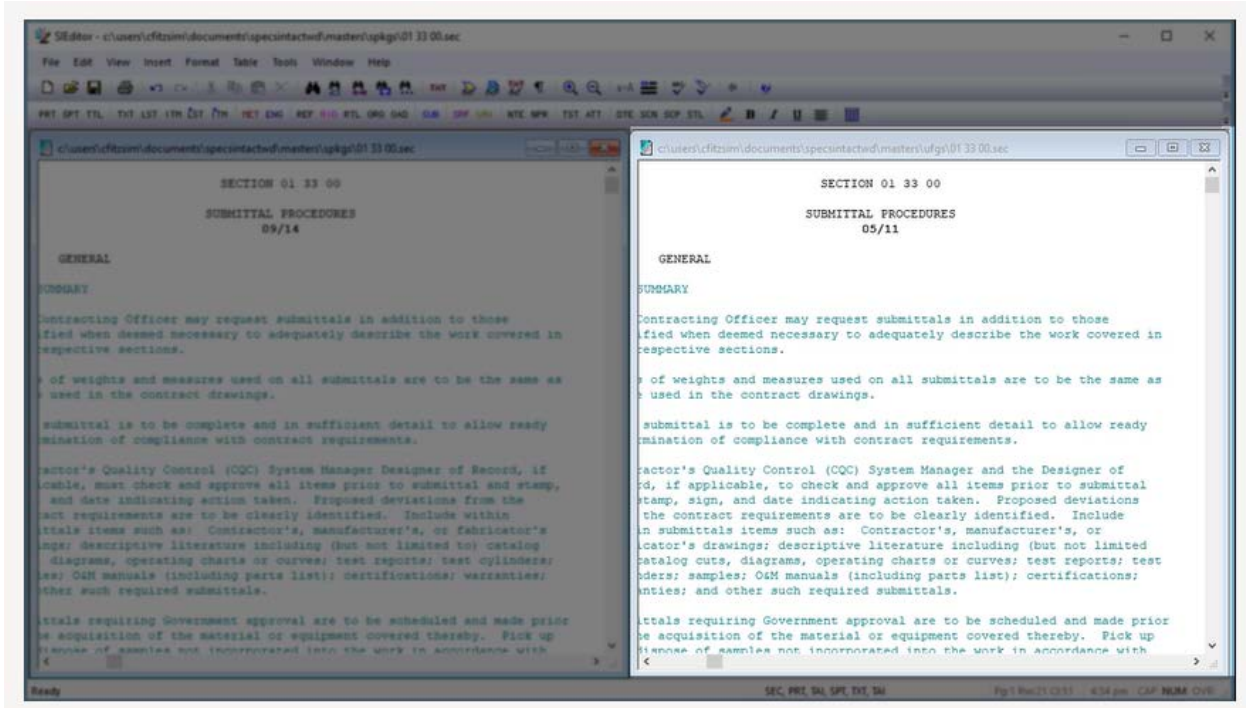
Once you have updated this Section in your Local District Master, drag and drop the Section into the Custom UFGS Master. Once you have overwritten the Section in your Custom UFGS Master, you will see the Preparing Activity reflects CESPK, which is the one used by the Local District Master.
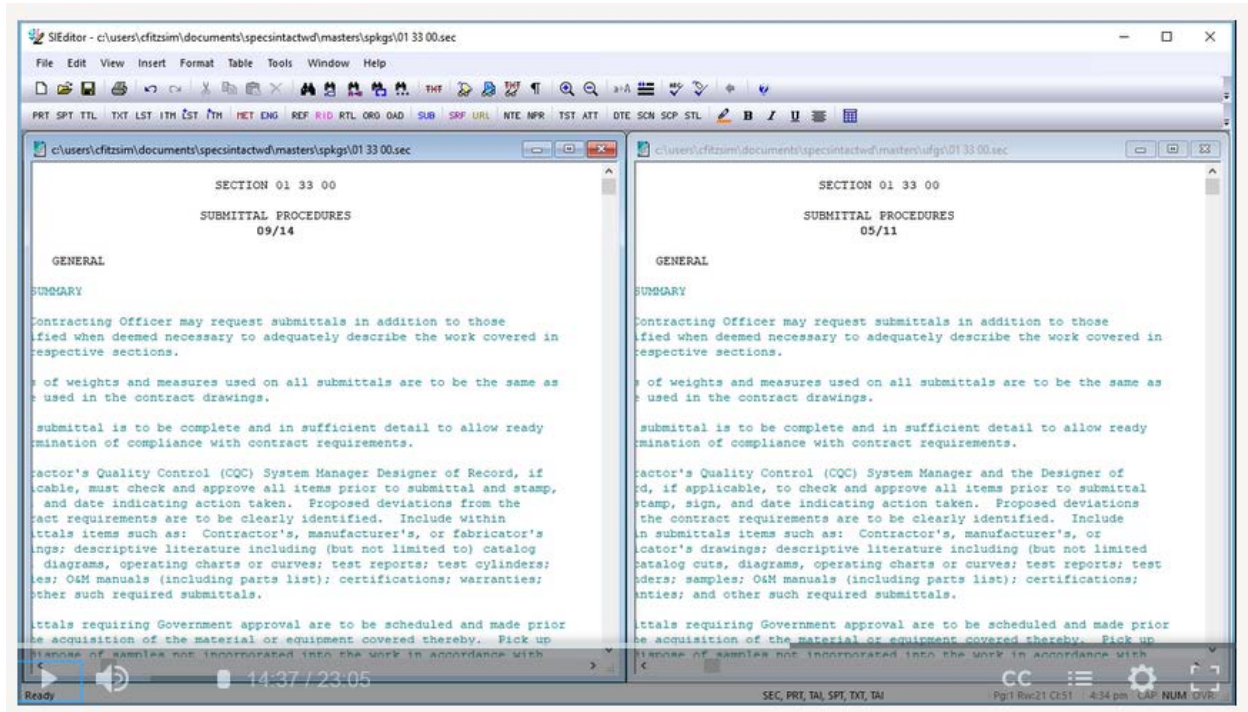

To simplify the process for adding the local Reference Publications to the Custom UFGS Master 01 42 00 Sources for Reference Publications Section, the Sacramento District created a local District Sources for Reference Publications Section 01 42 00.13 41 in order to easily maintain the list of Reference Publications.
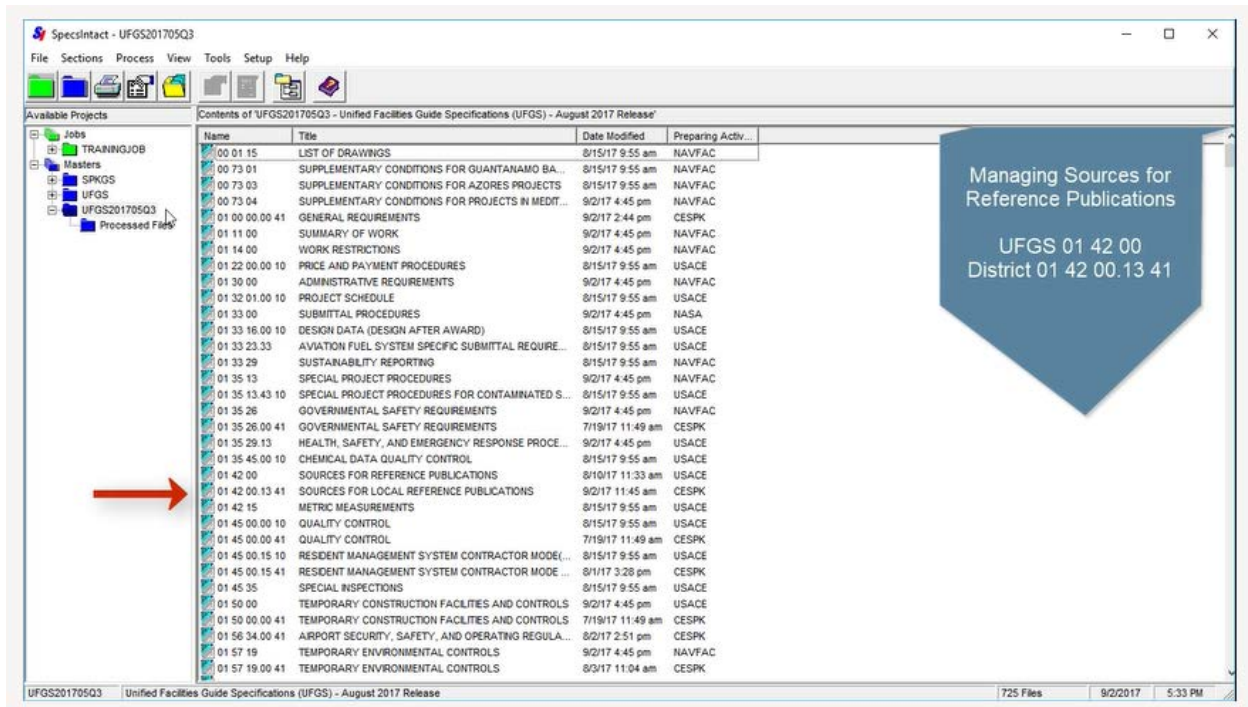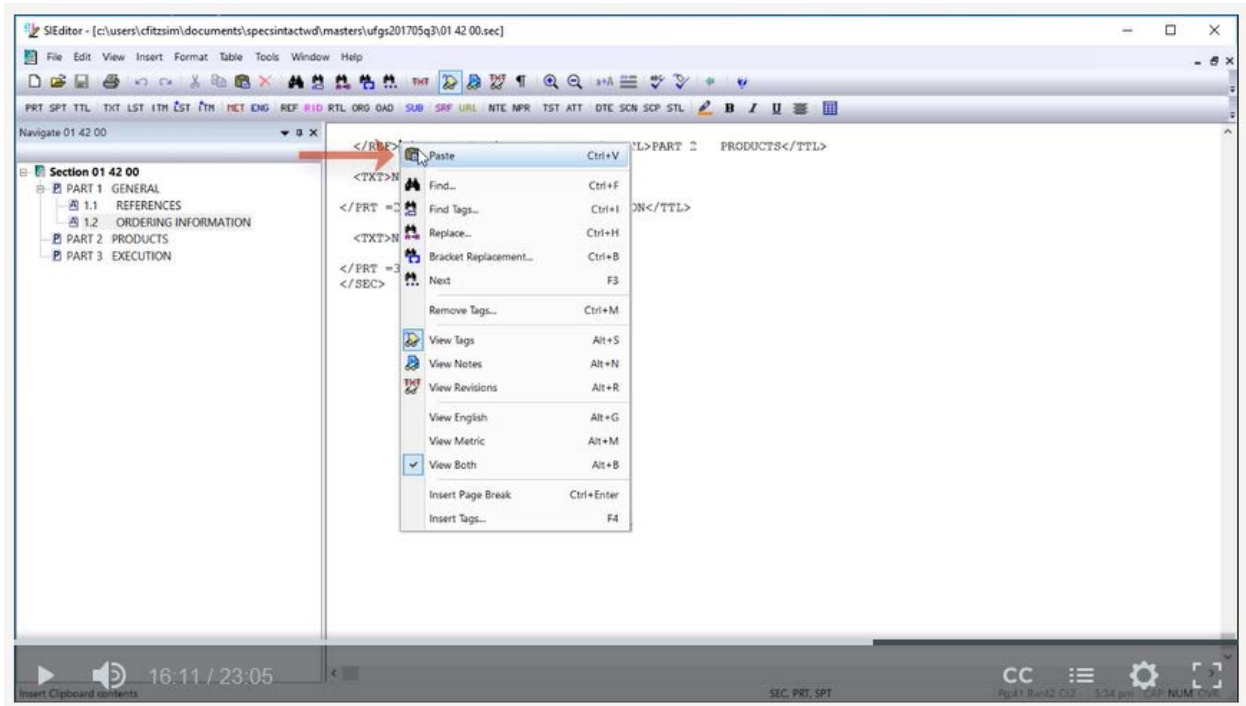
To do this, we are going to *open* **Section 01 42 00.13 41**, so we can *highlight* all of the **Reference Publications**, then *right click* and **select copy**.
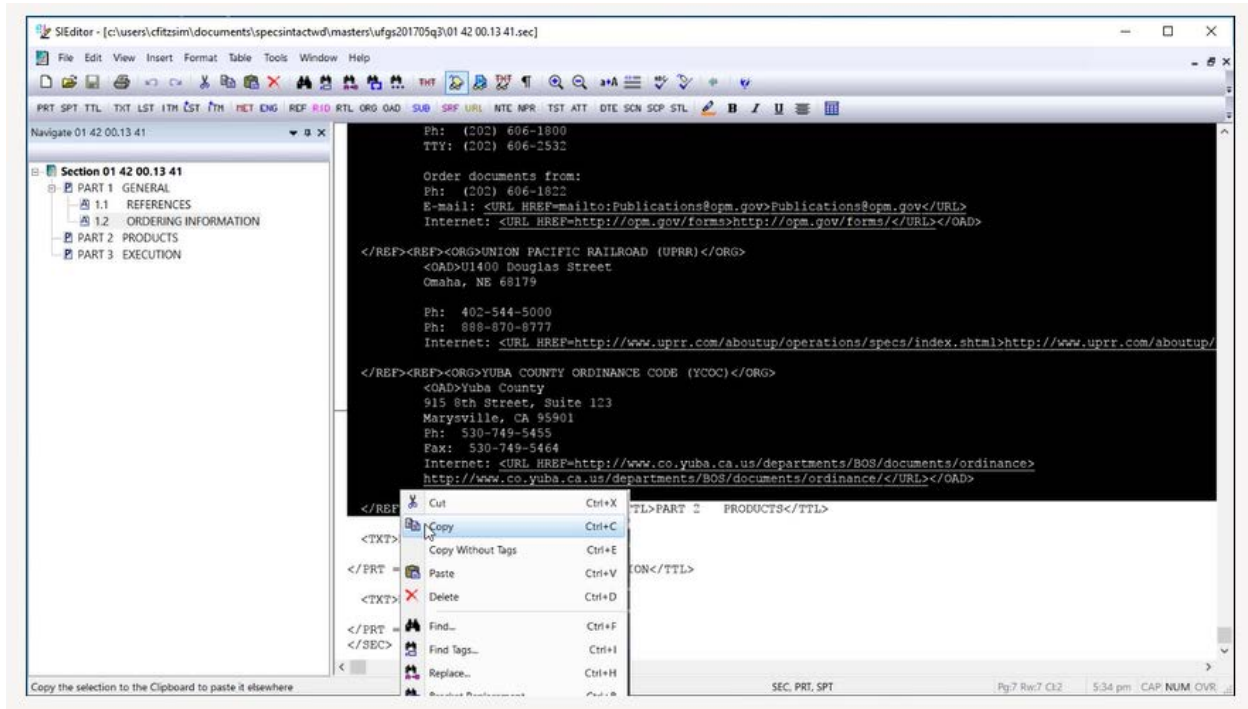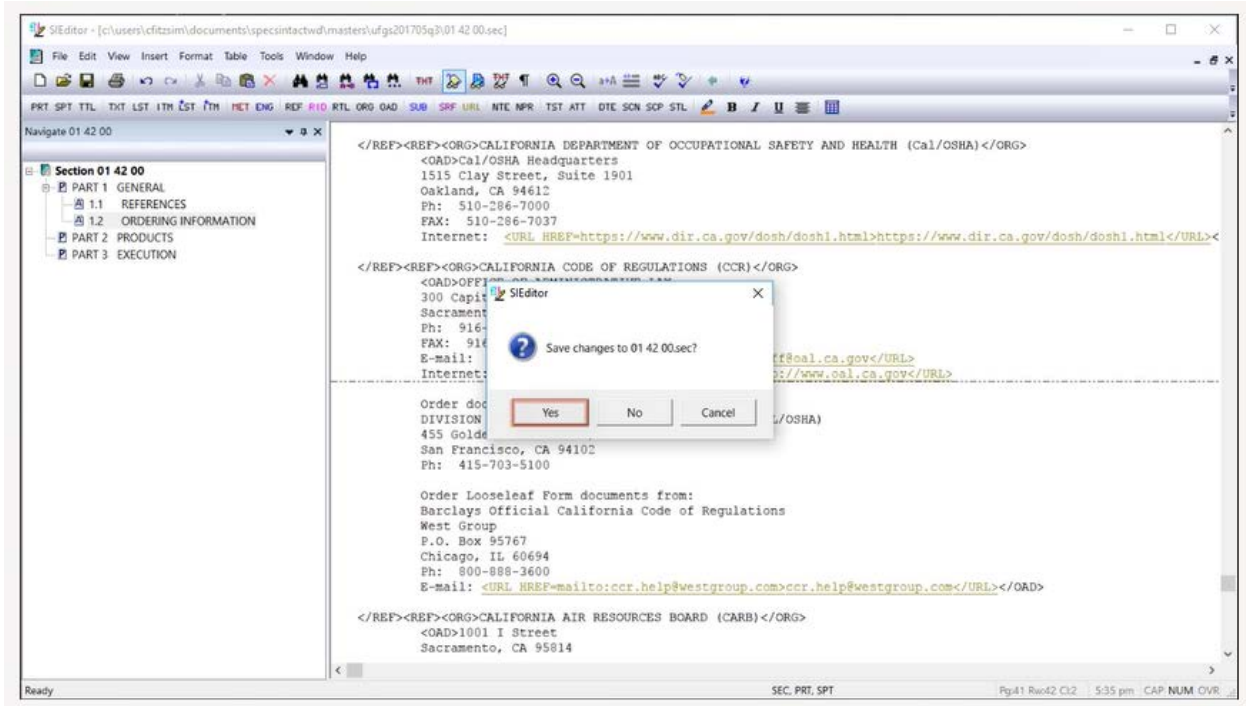

Now that we have the Local Reference Publications copied, we can close the Section and open the UFGS 01 42 00, *navigate* to **PART 2 PRODUCTS**, place our cursor following the ending </REF>,
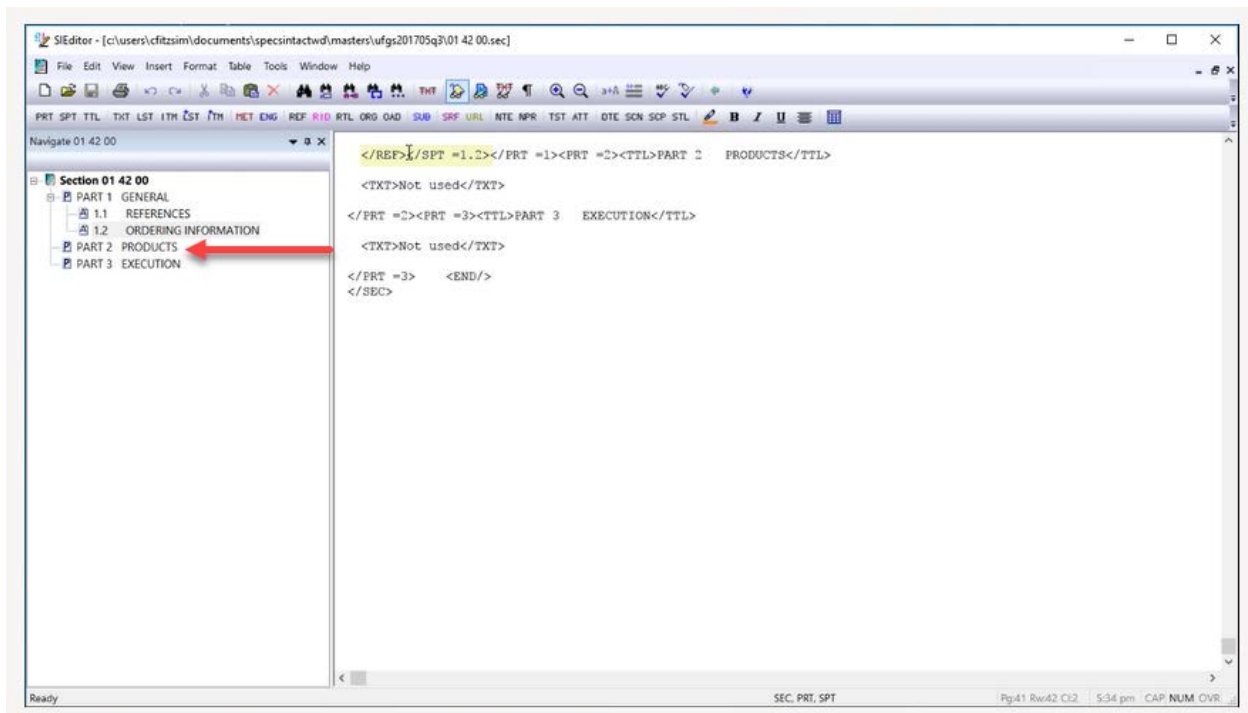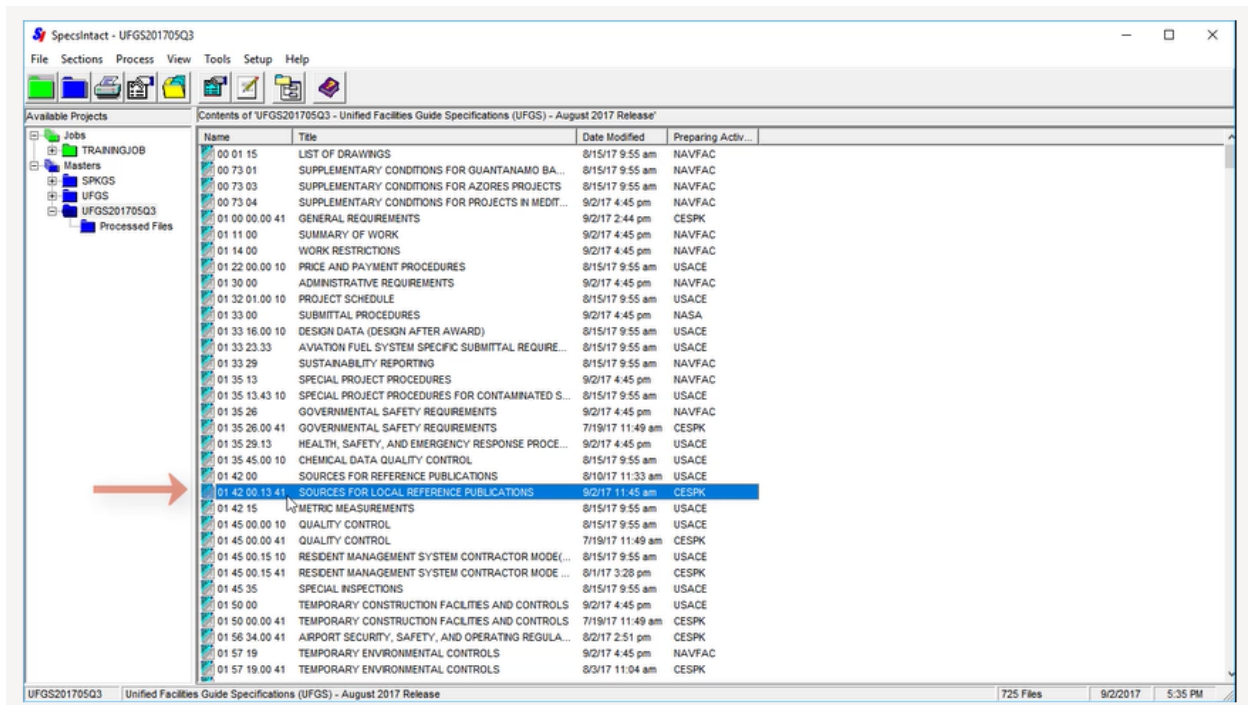
right-click and select paste.

With the Local Reference Publications added, let's close the Section. When prompted to save the changes, *select* **Yes**.

With the merge complete, we need to delete the 01 42 00.13 41 Section from the Custom UFGS Master.


Now you are going to refer to the UFGS Changes and Revisions document in order to identify what other Sections need modification. As I mentioned earlier, if the changes are minor, you will update the District specific Sections, if they are major, then you will revise the UFGS Sections to include the local requirements. Once you have completed the task of comparing and revising a Section, then delete the duplicate Section.
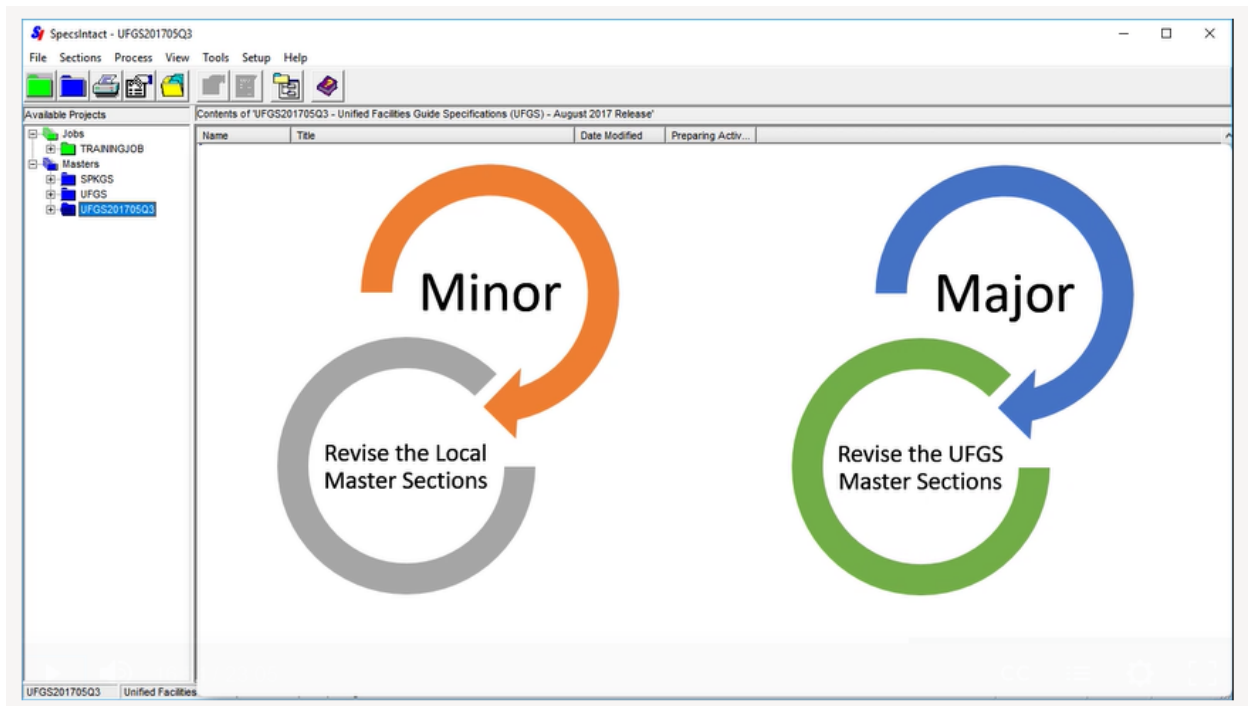
If the changes were minor, that means you modified the District guide specification with the fifth level extension, so you would need to delete the duplicated UFGS Section.
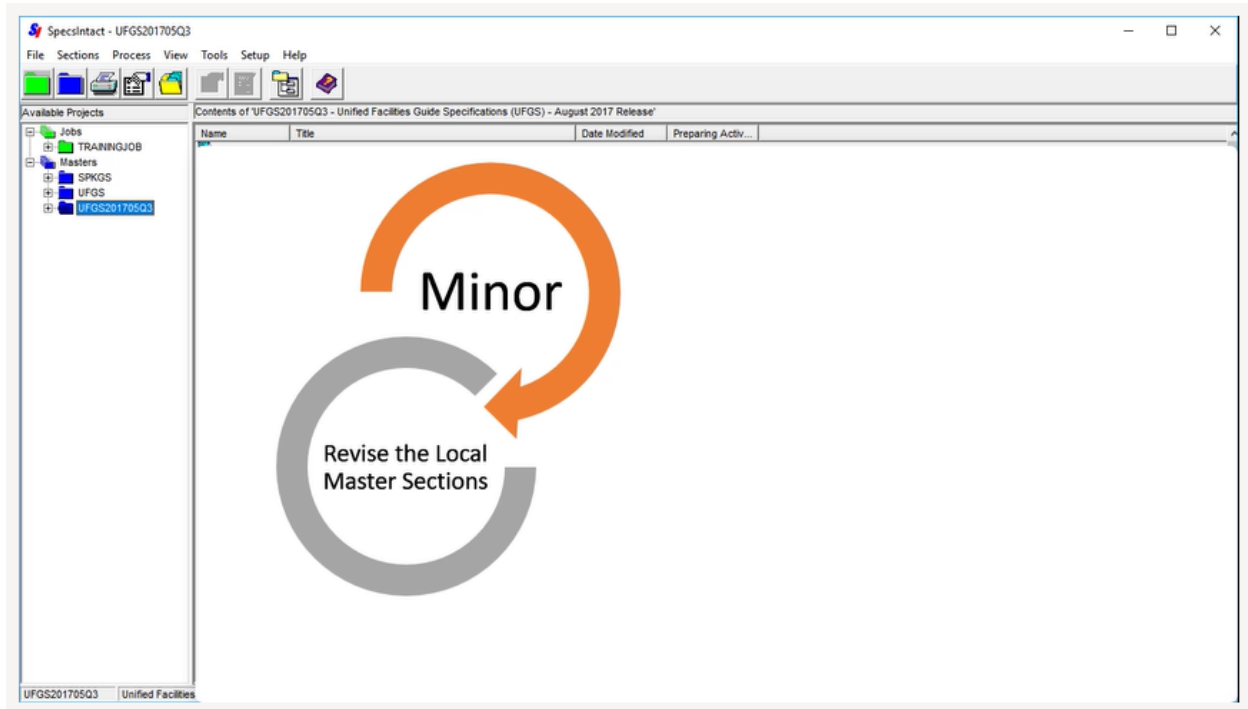
If the changes were major, that means you incorporated the local requirements into the UFGS Section, with the intention of this Section replacing your District Section.
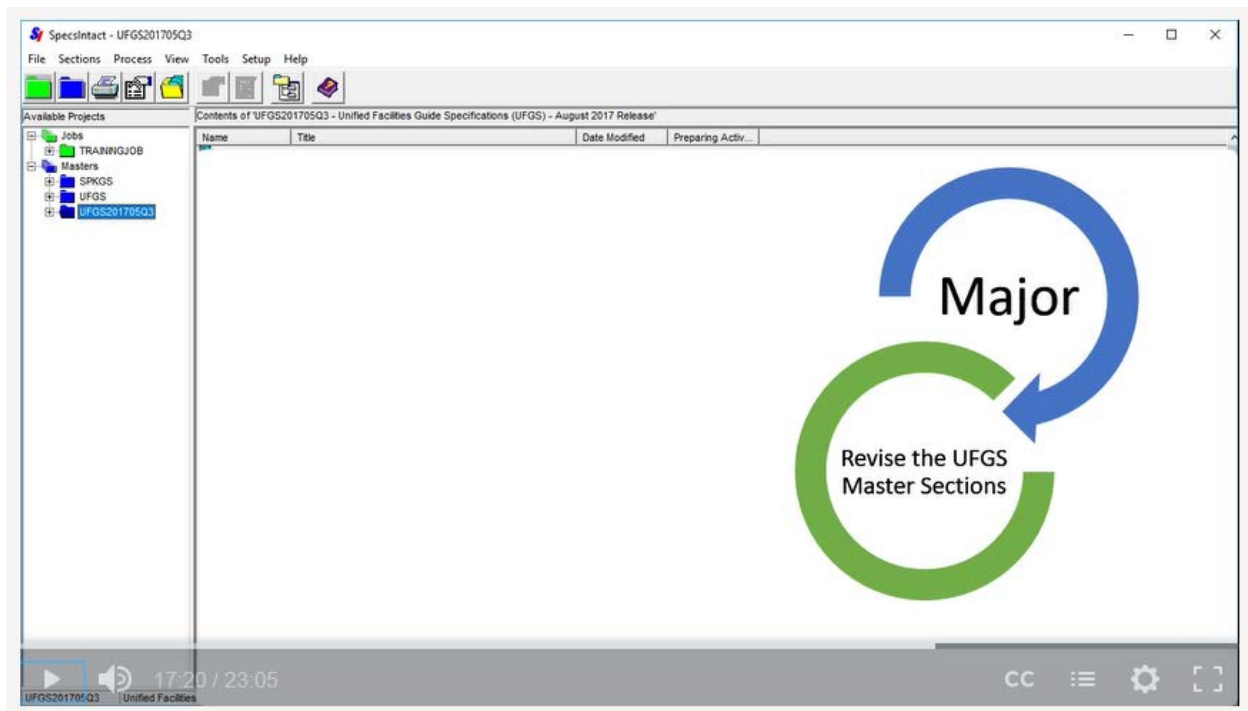
In this case, you would delete the District Section first, rename the UFGS Section to add the fifth level designation and then modify the Section Header accordingly. This Section now becomes your District Guide Specification! Before continuing to the next phase make sure to back up your Custom Master.
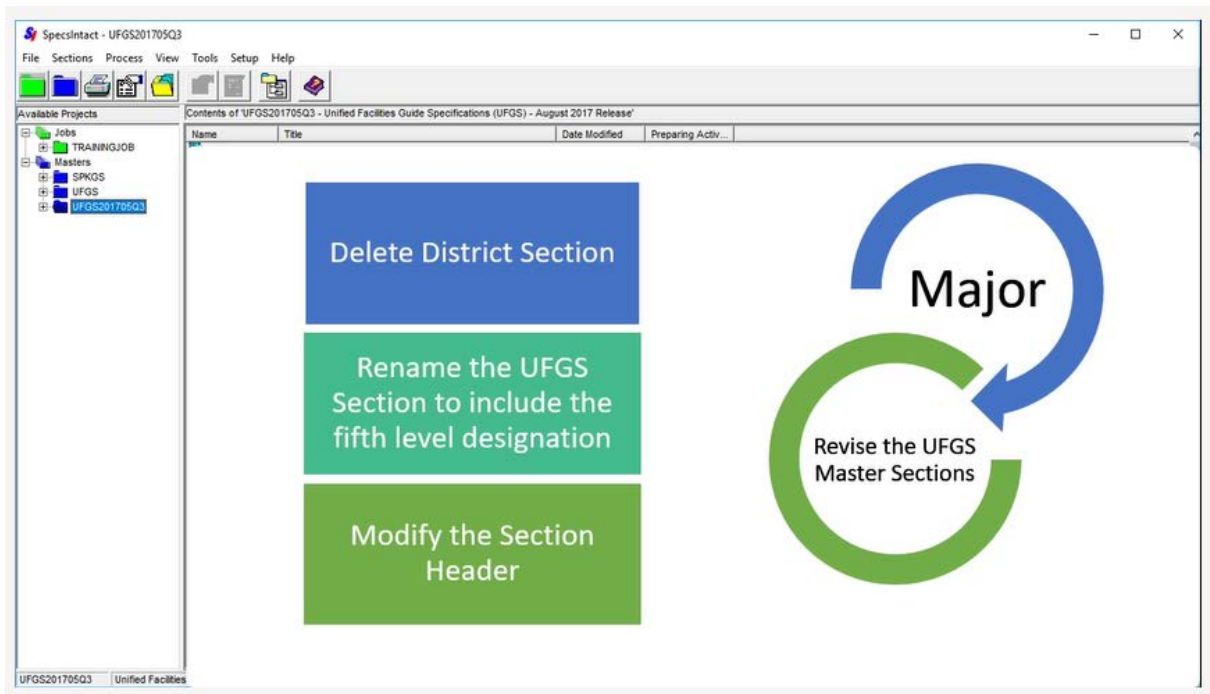

00:18:01,800 --> 00:21:52,300

As we approach the final phase of this process, we will focus on the References. SpecsIntact provides the Unified Master Reference List (UMRL), which contains all the Reference publications used in the latest UFGS.
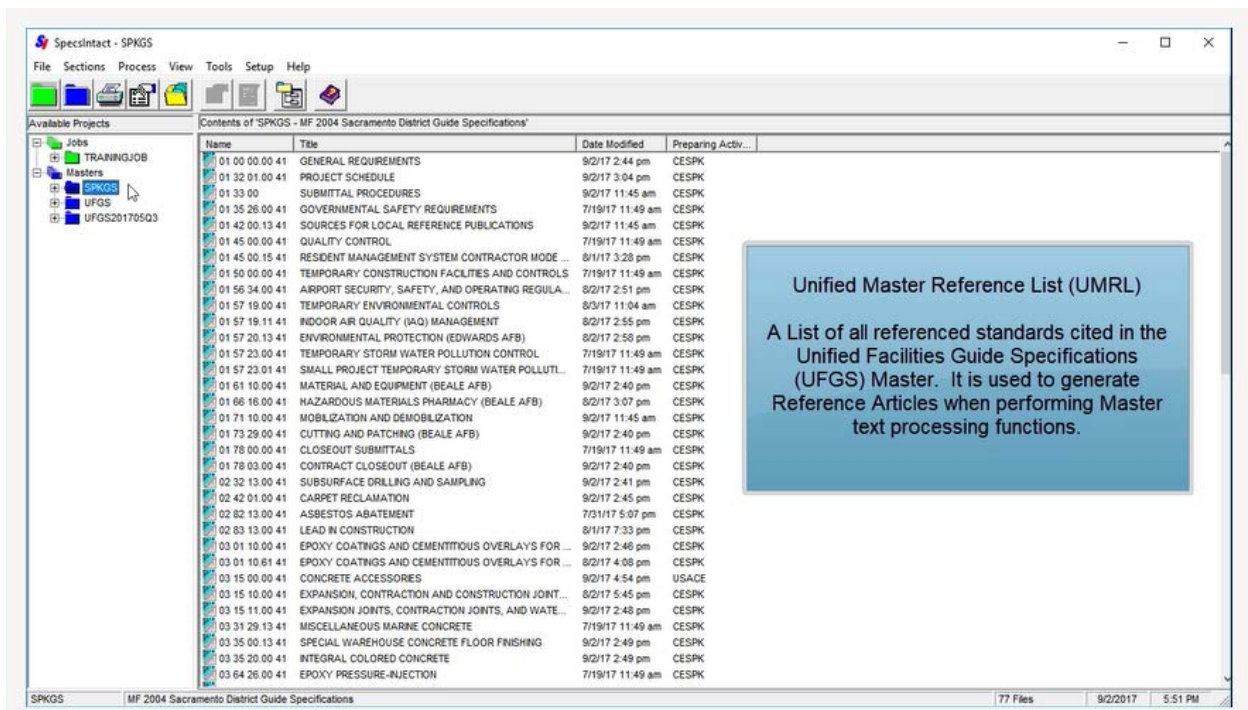
Your local Master may contain References that appear in the UFGS Master's UMRL, as well as other local or unique References. In order to update the local Master's "unified" References using the current UMRL, as well as update or leave other local or unique References unchanged, begin by generating the Master Reference List (MRL) for the Local District Master, update the local unique References, and then Reconcile the References against the UMRL and the MRL. A written procedure for this portion of the task is located in the Resources section of the eLearning Modules web page.
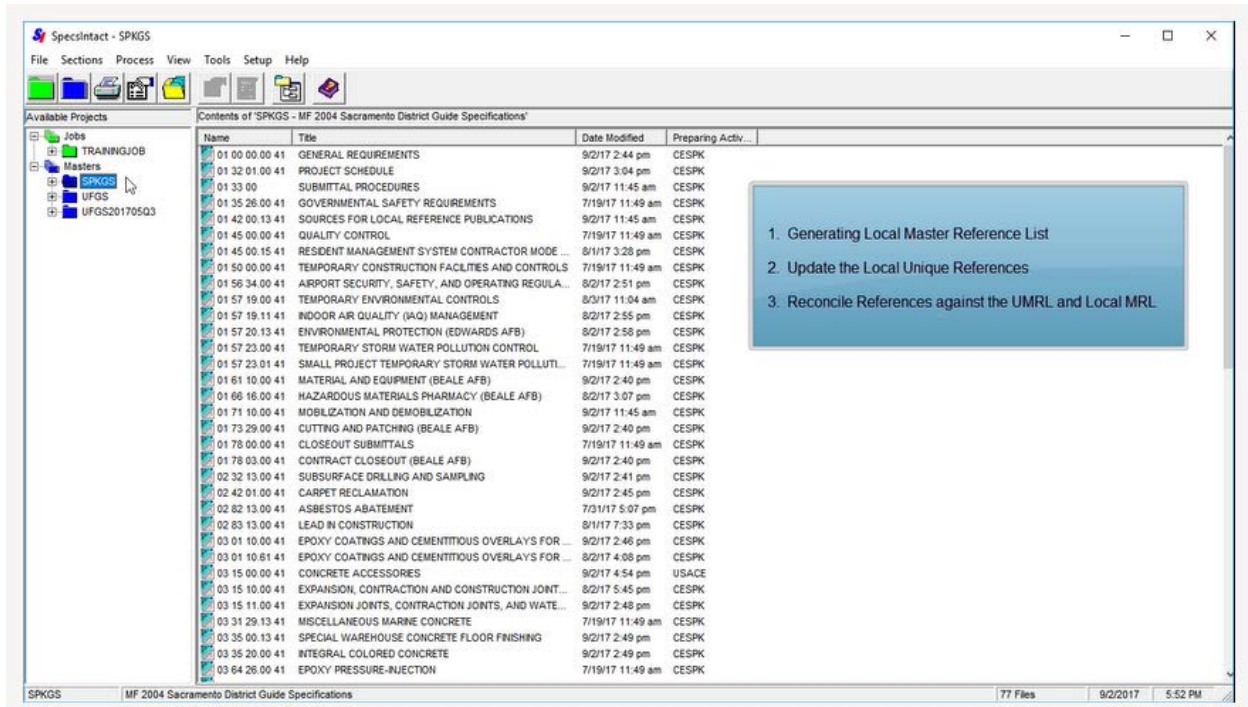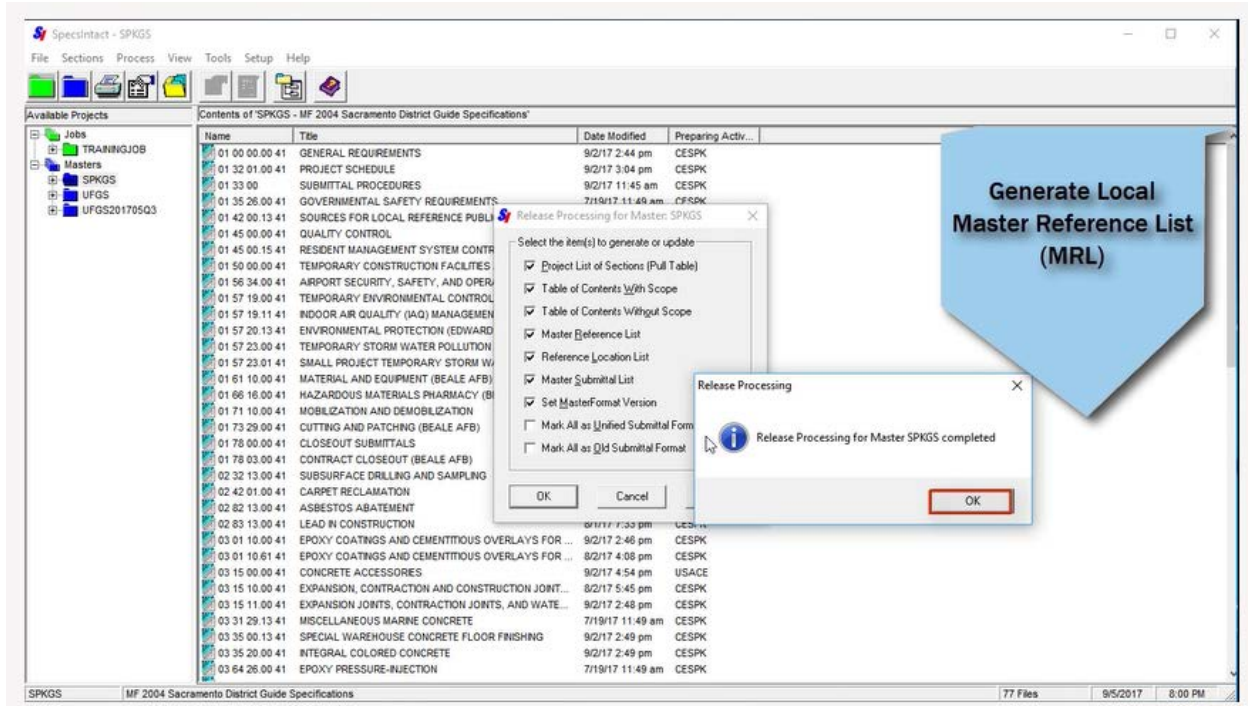

In order to generate the Local District's MRL, *right-click* and choose **Release Processing**.
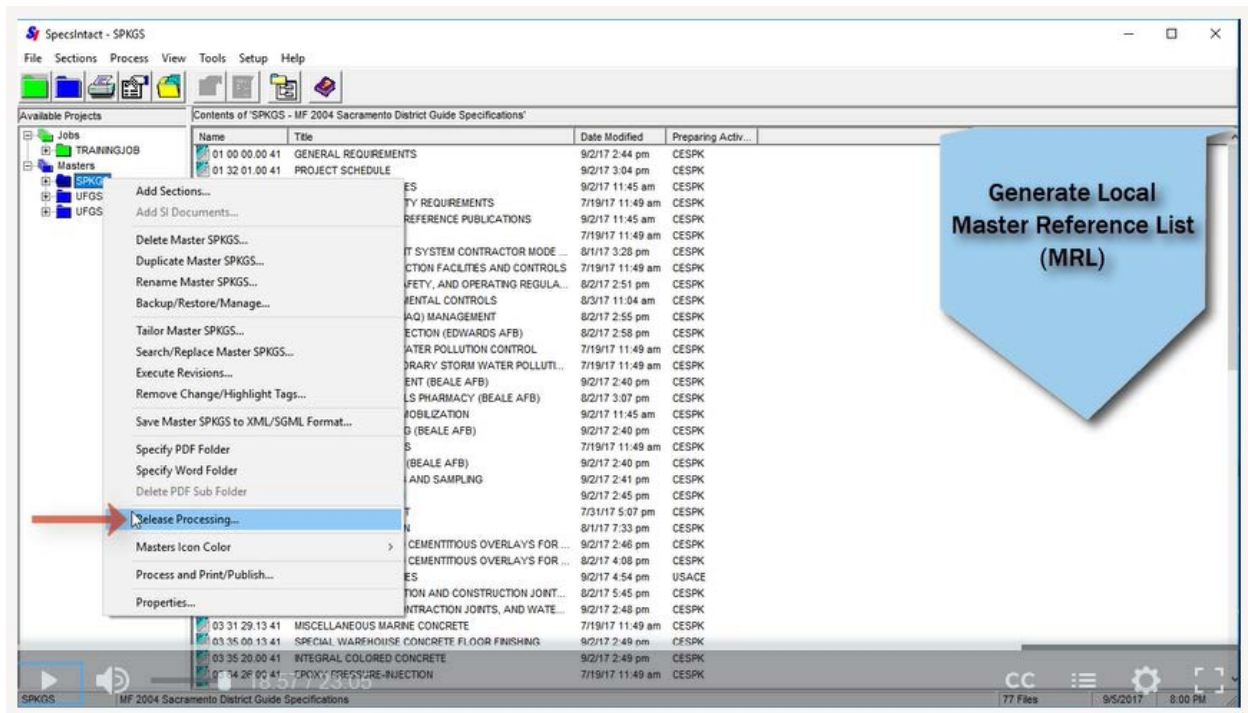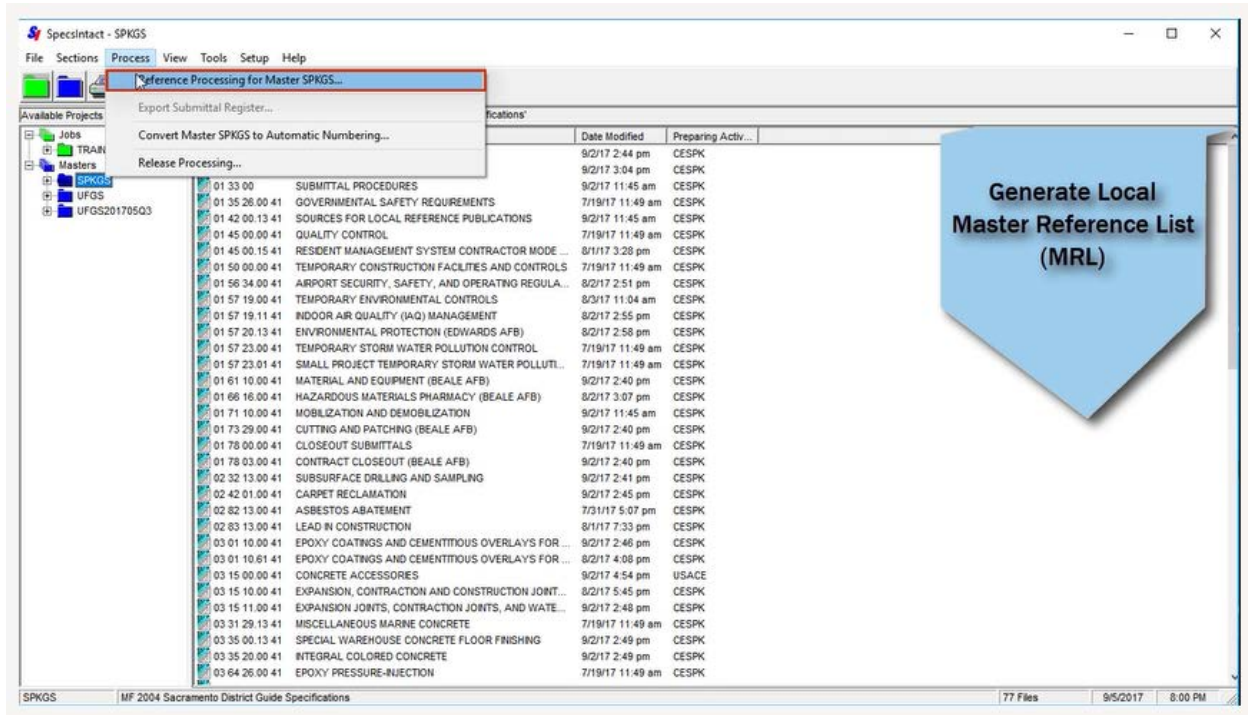
From the Release Processing for Master window, leave the default selections and *select* **OK**.
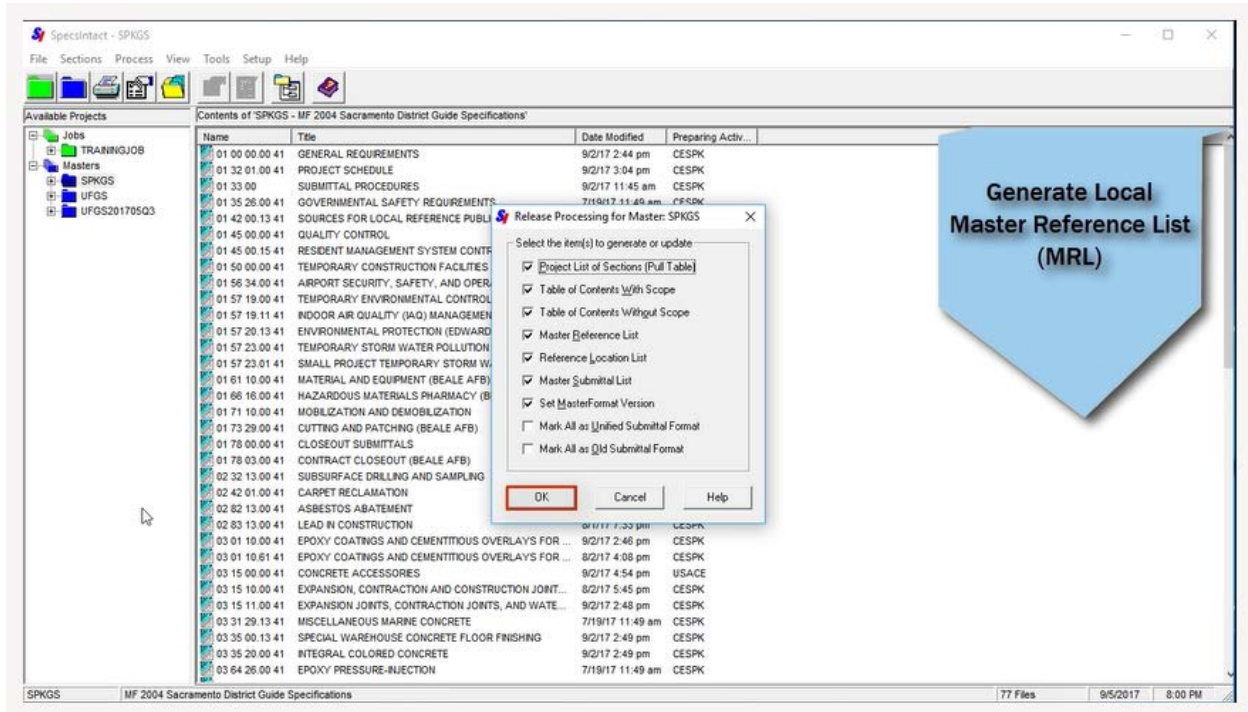
When the Release Processing confirmation window appears, *select* **OK**.

Once you have generated the Local District MRL, you will need to return to the Process Menu in order to update the local unique References, select Reference Processing for Master.


Choose the Master Reference List tab. Below Action, we want to use the default selection Edit List. Below Master Reference List file, verify the path is for the District Master, and then *select* **OK** to open the Master.ref file in order to update the unique References.
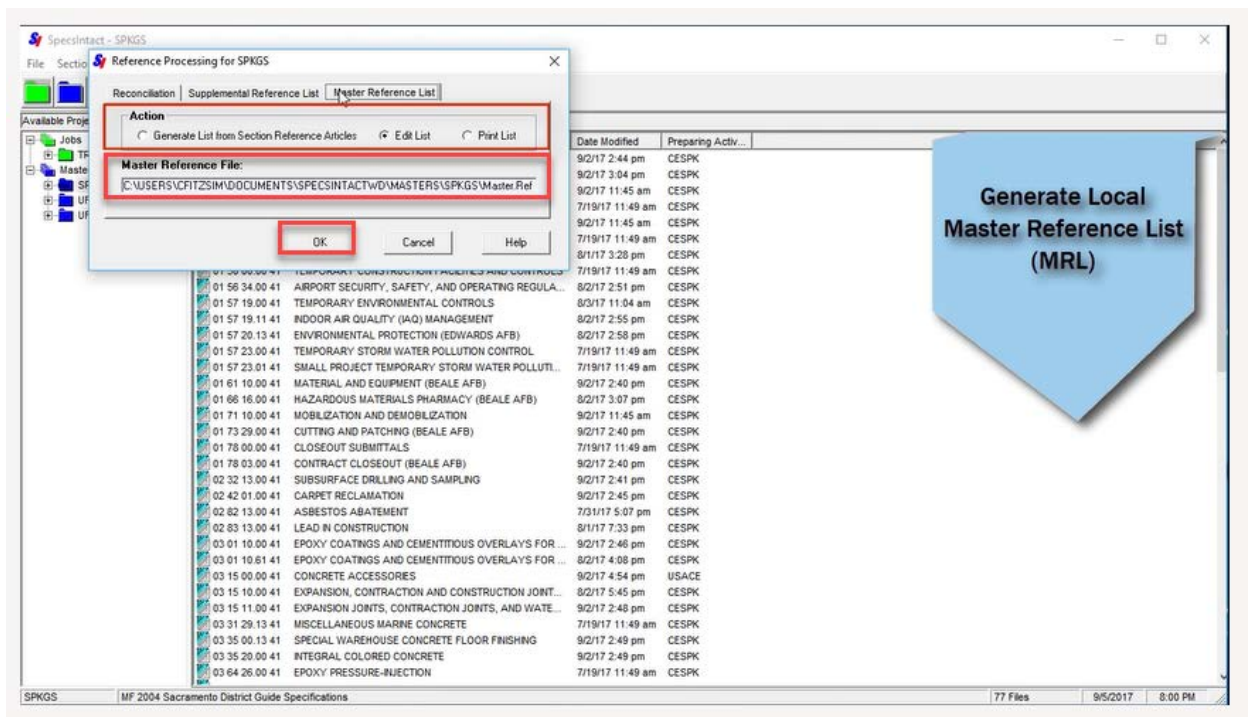
Once you have completed the updates, save and close the Master.ref file and close the Reference Processing Window to return to the SI Explorer.
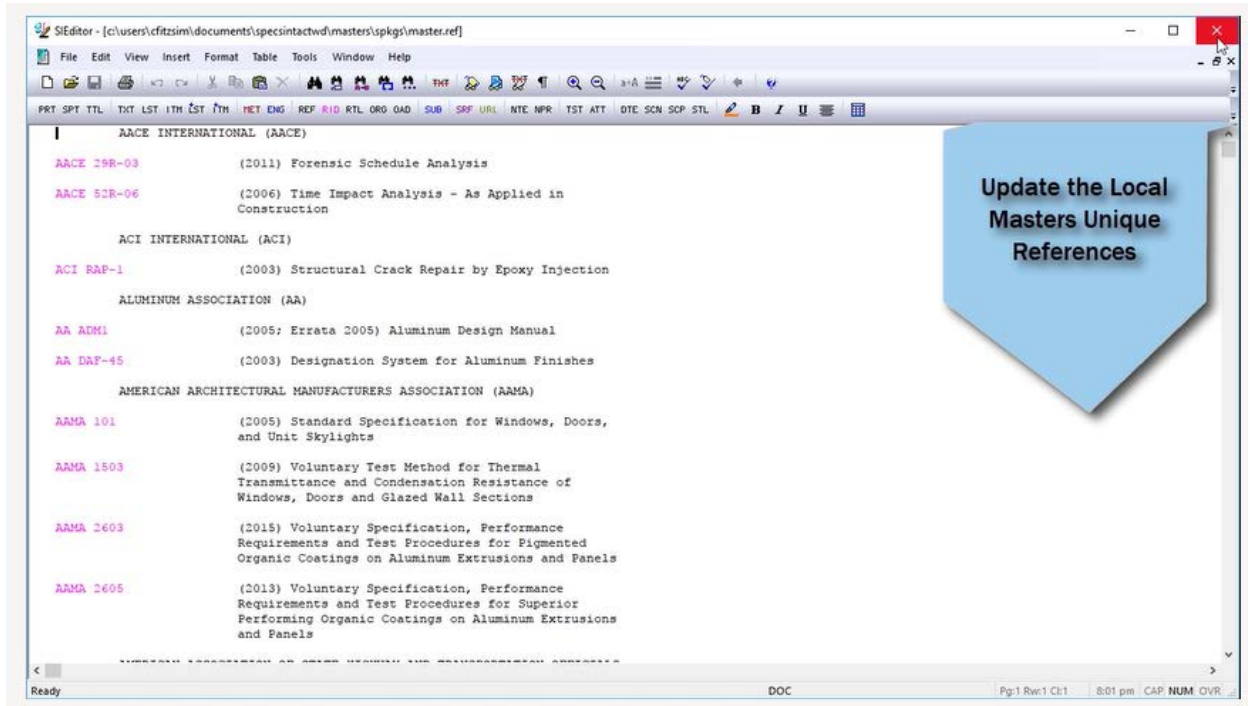

Now that you have completed updating the local unique References and generated the Local MRL, it is time to Reconcile the References.
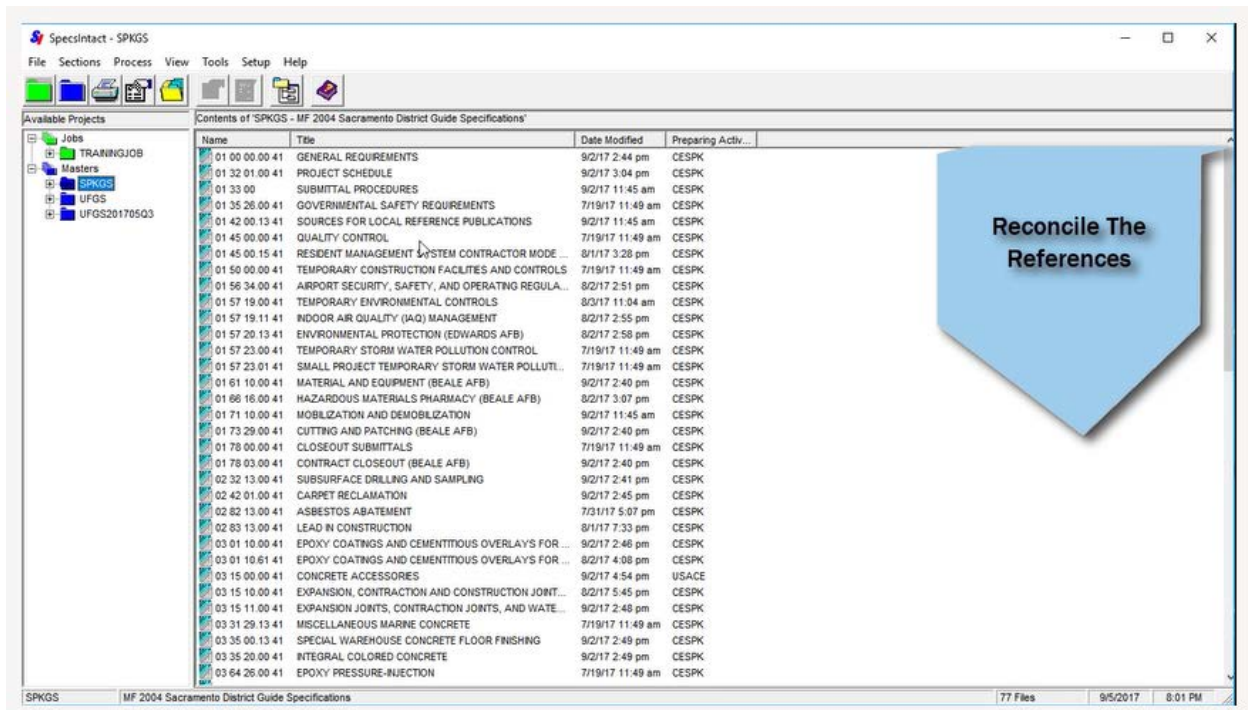
First, we need to perform the Reference Processing against the UMRL. This function will delete the existing Reference Articles throughout the Master and then generate new ones based on the References used in the Sections' text. Let's select the Custom UFGS Master, then go to the Process Menu and select Reference Processing for Master.
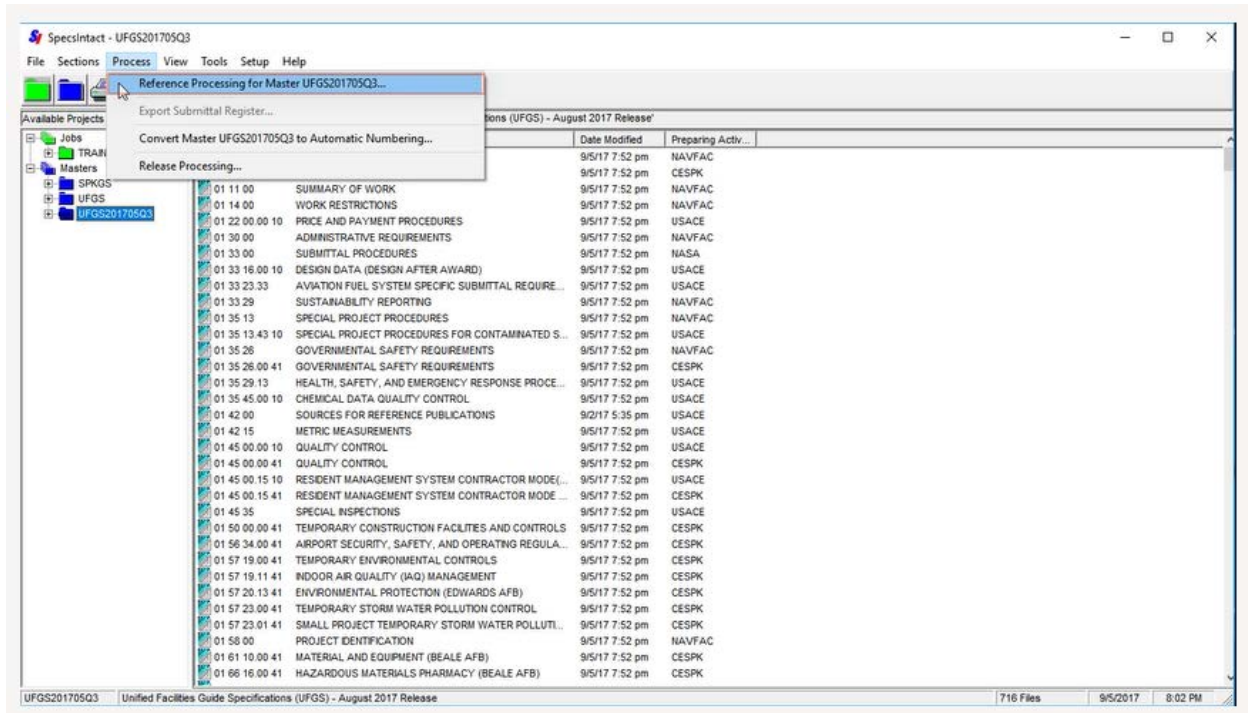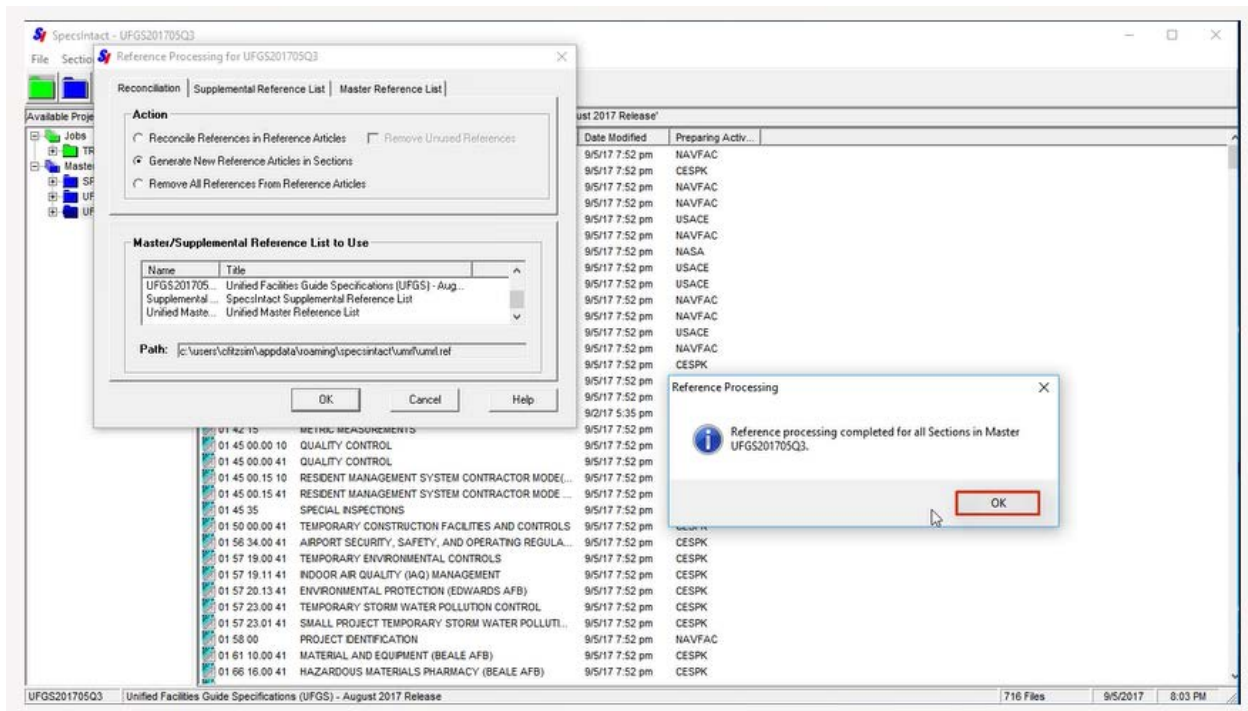

Choose **Generate New Reference Articles** in Sections. Below Master/Supplemental Reference List to Use, choose the Unified Master Reference List and *select* **OK**.
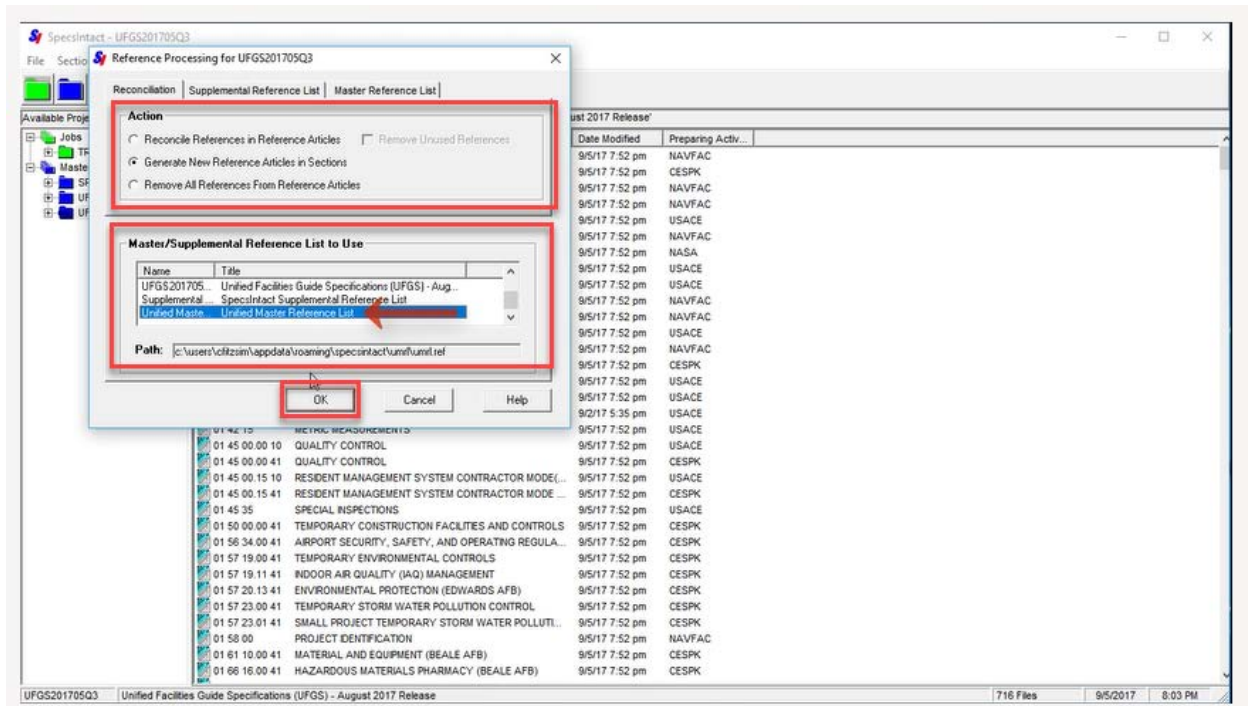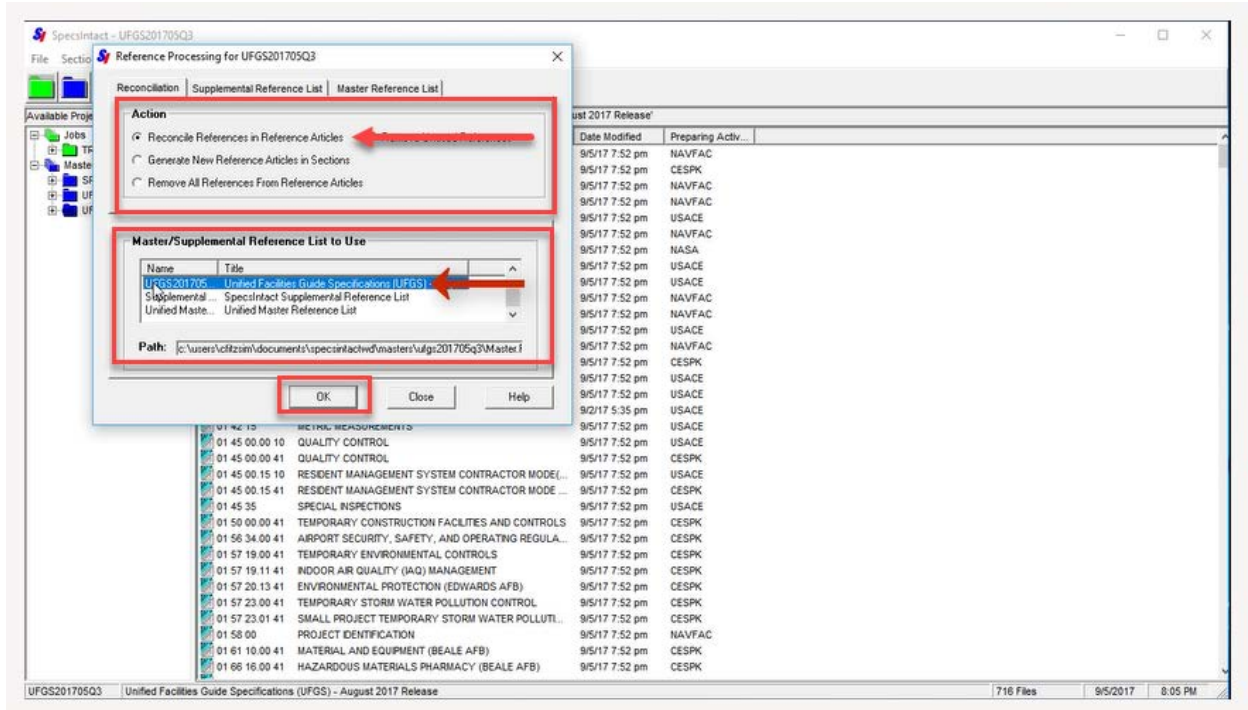
When the Reference Processing Confirmation windows appears, *select* **OK**. Due to the size of the Master, this process will take a minute or two to complete.
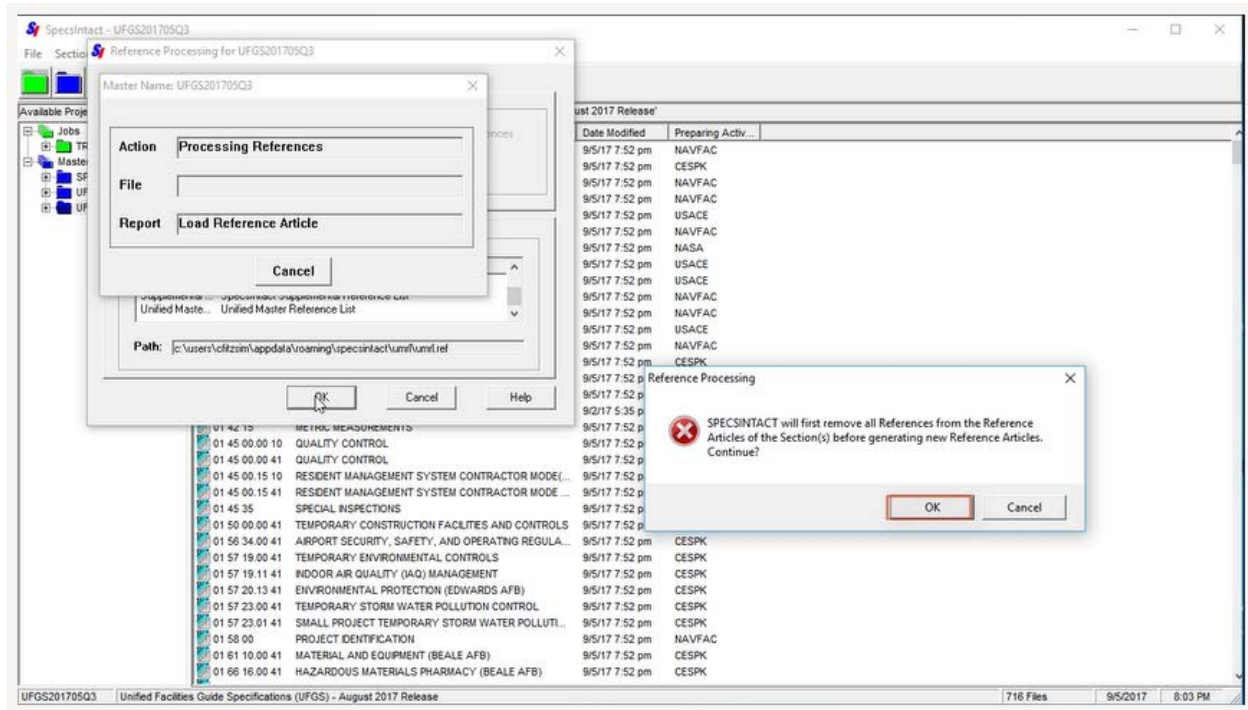

Once the Reference Processing confirmation window appears, select OK.

Now we are going to go through the process again, but this time, we are going to Reconcile the References against the District Master Reference List that was generated earlier in order to incorporate the local and unique References. From the Reference Processing window, *choose* **Reconcile References** in Reference Articles. Below Master/Supplemental Reference List to Use, *choose* the **UFGS201705Q3** and *select* **OK**.
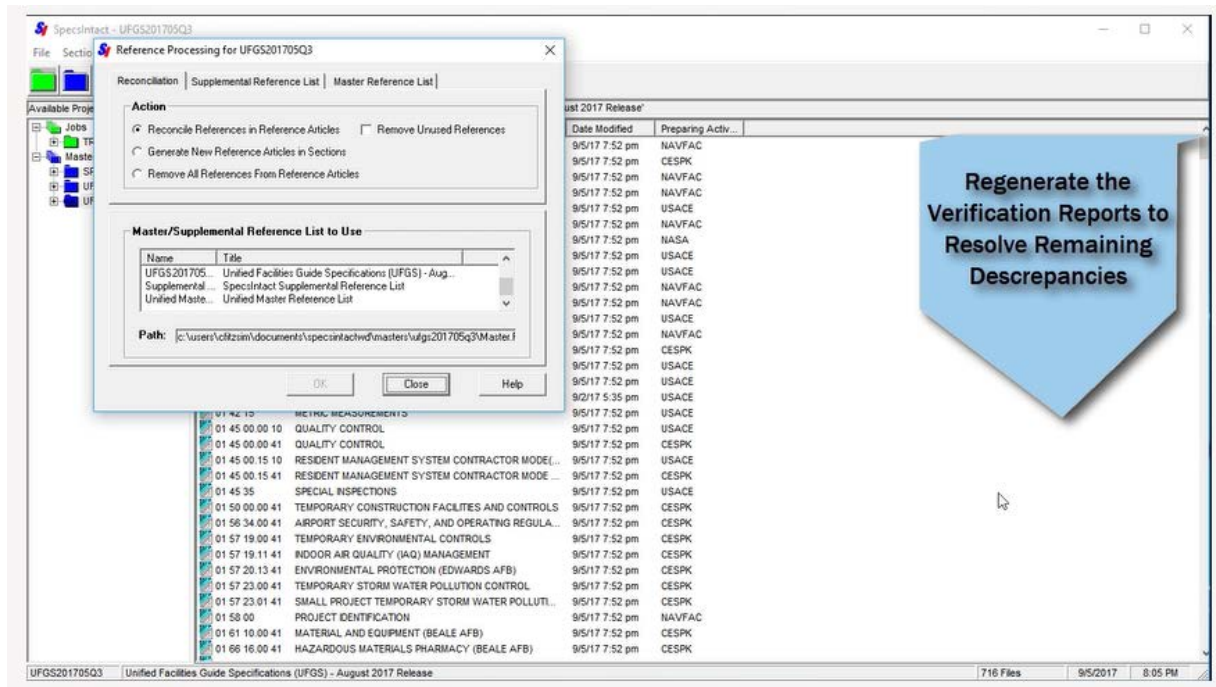

Once the Reference Processing confirmation window appears, *select* **OK**.
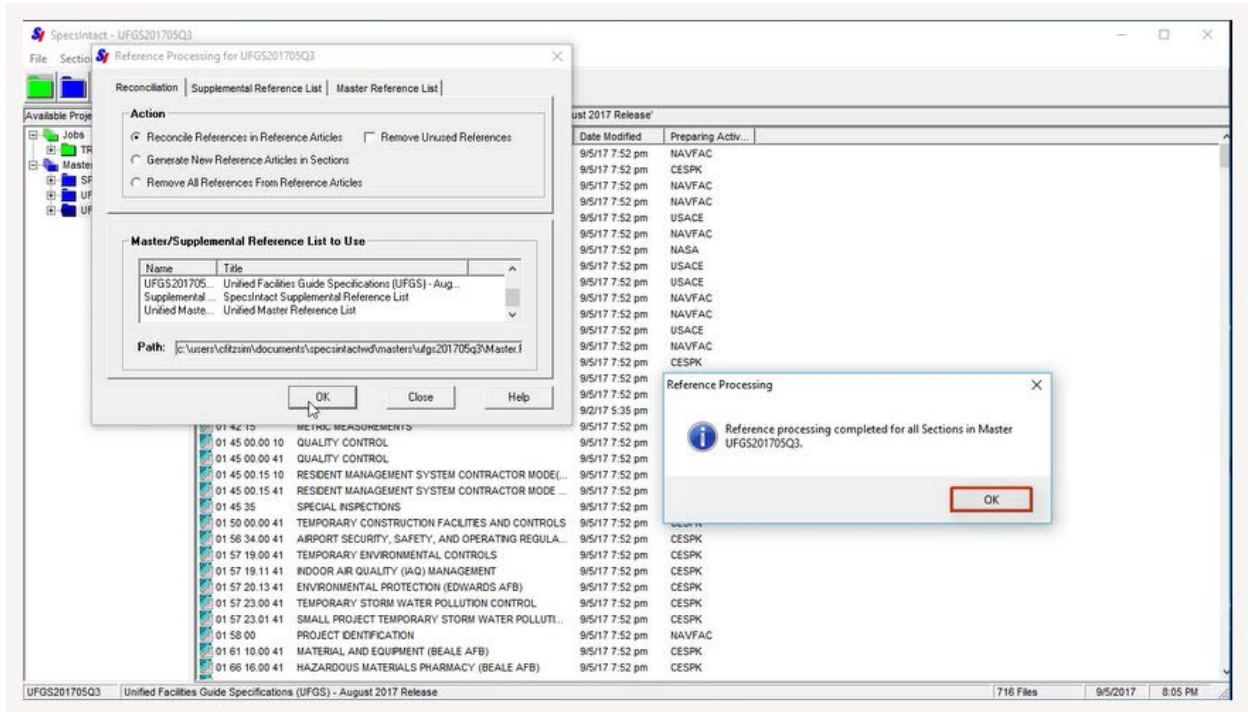
As we approach the final stage to this process, make sure to regenerate the Verification Reports in order to resolve any remaining issues to include Duplicate References.

Once the Report issues are resolved, make another backup of the Custom UFGS Master for distribution. You will provide a copy to the A-E Negotiations Office for distribution to the A-E Firms. Once that is complete, notify the Designers to connect to the new Custom UFGS Master. Lastly, copy the CESPK guide specifications back to the Local District Master, overwriting the existing Sections. This will allow for maintenance and development of new Master guide specifications.
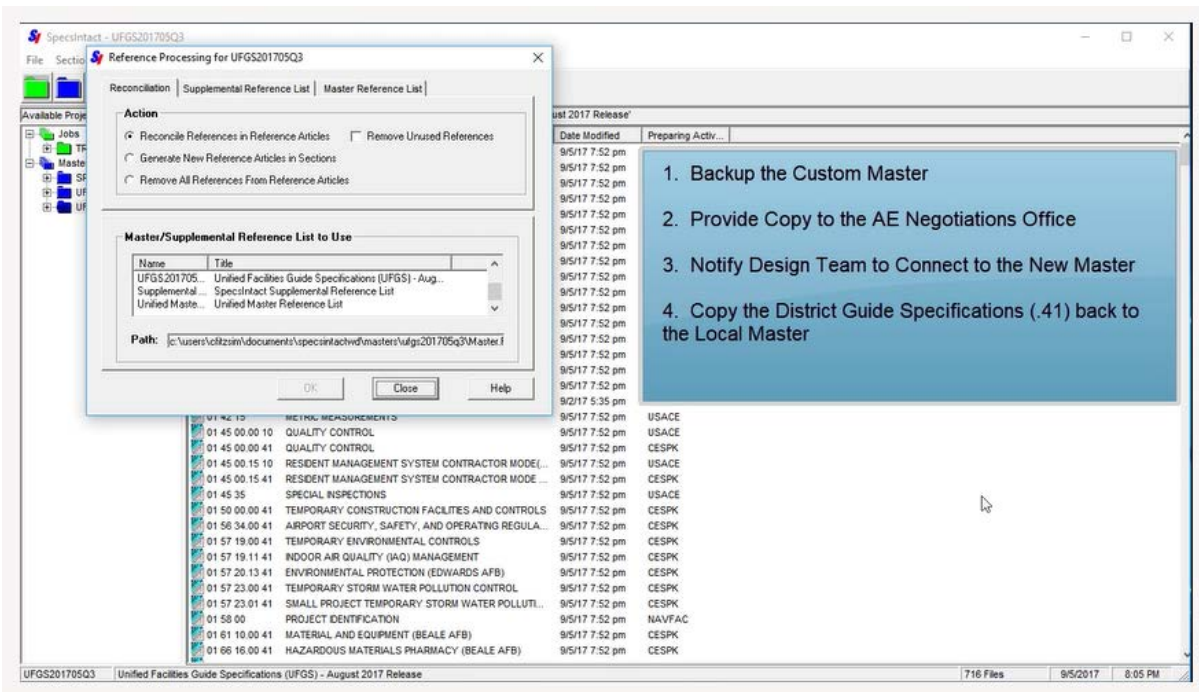
Now that you have completed this process, remember to go through this process following each UFGS Release. Once you have gone through this process a few times, you will become an expert! This completes the lesson for creating a custom UFGS Master for your District and associated A-E Firms. To learn more, please continue to the next module of your choice.
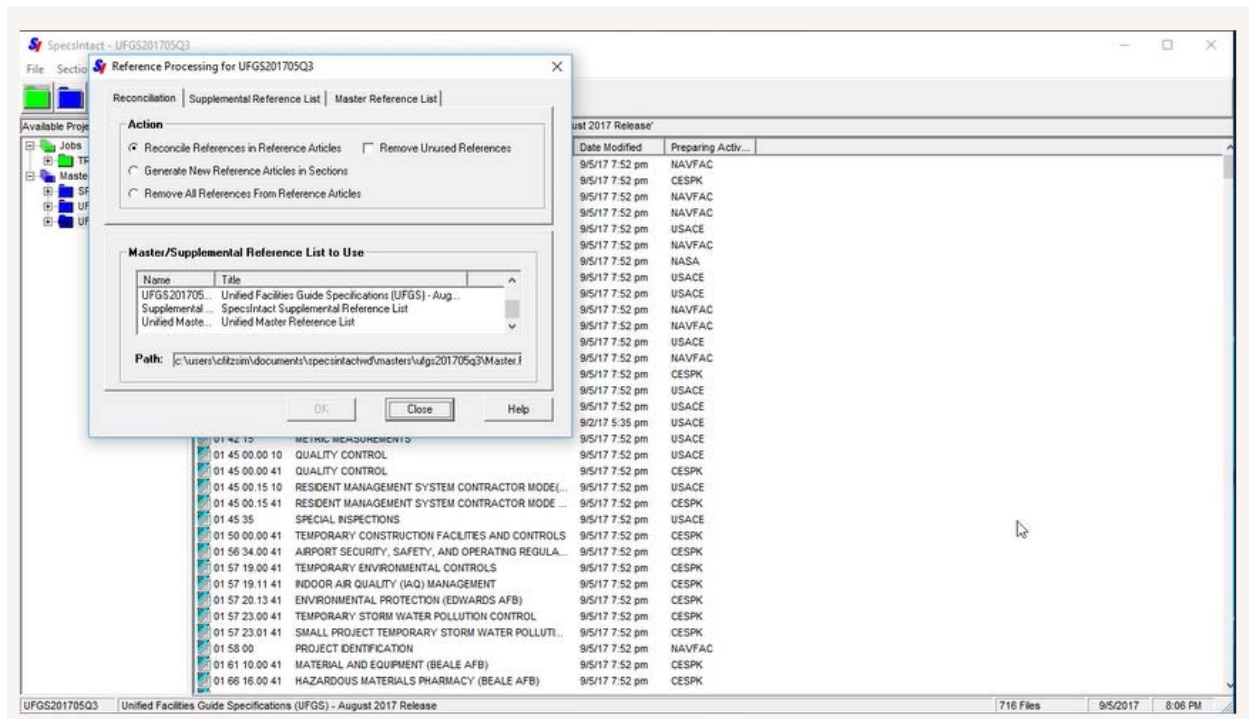
Contact Information

If you need further assistance, please contact our Technical Support Desk. We will be happy to answer any questions you may have.

SpecsIntact Technical Support
Monday - Friday
8:00 AM – 4:30 PM Eastern Time
Phone: 321.867.8800
Email: KSC-SpecsIntact@nasa.gov

eLearning Module Notes: