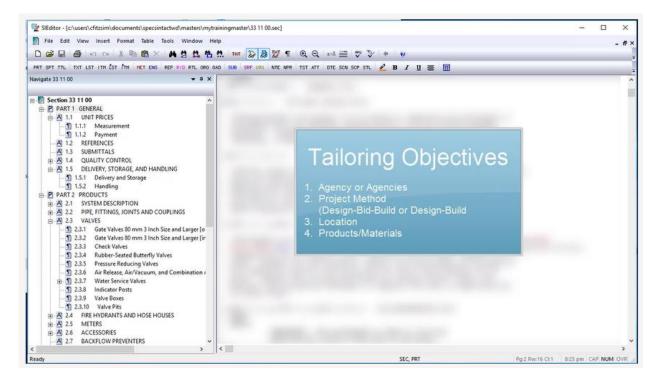
SpecsIntact eLearning Modules Transcript

Module: Chapter 7 - Inserting and Managing Tailoring Options

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.

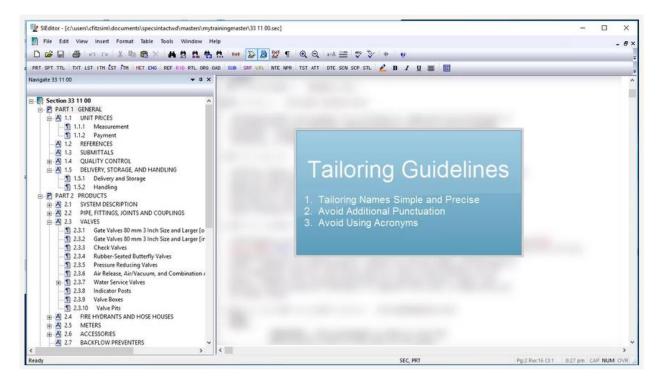
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In this module we are going to focus on the requirements for inserting and managing Tailoring Options within a Unified Facilities Guide Specification (UFGS) Master. Tailoring Options are designed to make project specification editing easier. We Tailor specifications to allow the selection of an Agency or Agencies, project methods such as Design-Bid-Build or Design-Build, location, and/or products. Tailoring allows the designer or editor to exclude various requirements, thereby pre-editing a guide specification to remove requirements that do not exist in the project and simplify customization. Use Tailoring Options when alternative but equal systems or requirements appear throughout the guide specification such as when one agency has an automated system and the other agencies do not. Other examples would be to choose between iron, copper or plastic pipes or selecting one or two paint systems out of thirty. For the purpose of this training exercise, I removed all of the existing Tailoring Options to demonstrate the various lessons for inserting them within the Master Specification Section.



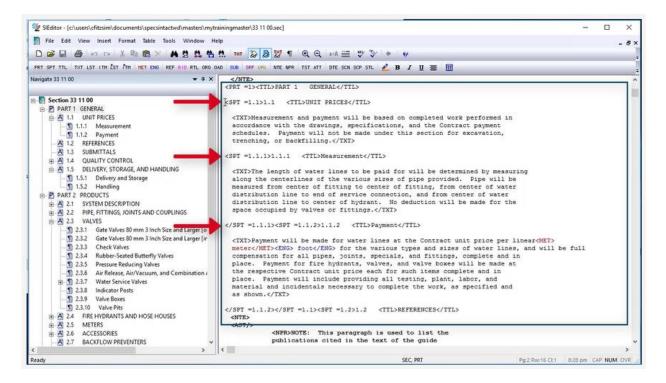
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Before we begin our lesson, I would like to review some guidelines you should follow when adding new Tailoring Options. First, keep the Tailoring Option names simple and do not make them too long, as they should only be one to three words. Secondly, avoid using additional punctuation marks such as commas or slashes. Commas separate and define multiple Tailoring Options and must not be used as part of a Tailoring Option. For instance, when adding "PIPES,COPPER" it would create two Tailoring Options, one for Pipes and the other for Copper over the same text. This would also be true when adding agency specific Tailoring. Lastly, avoid using acronyms as much as possible; spell it out so it is easy to understand. If you cannot avoid using acronyms, then define them in the general note at the beginning of the Section.

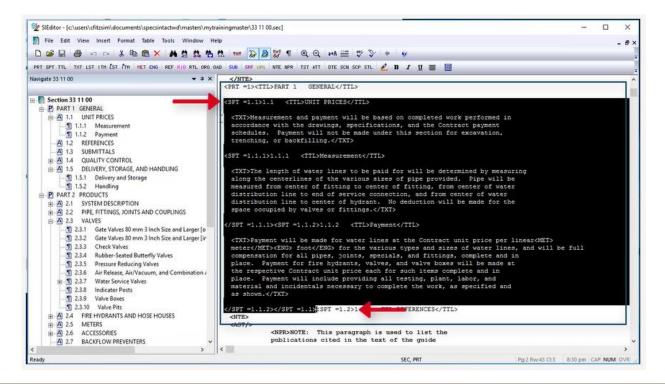


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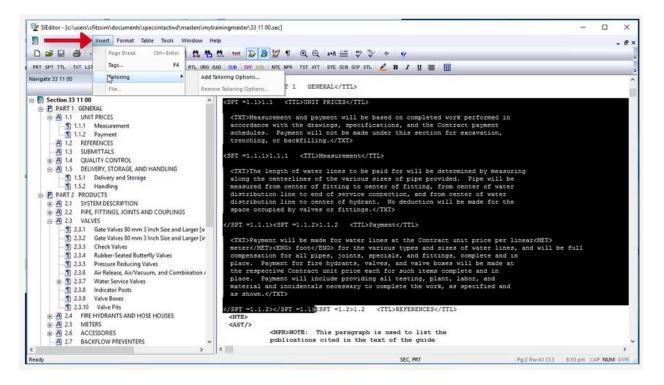
Let's start adding Tailoring Options! When adding Tailoring Options, you will always start by selecting the item to tailor first. We are going to begin by adding a Tailoring Option for Air Force, Army, and NASA around 1.1, 1.1.1, and 1.1.2.



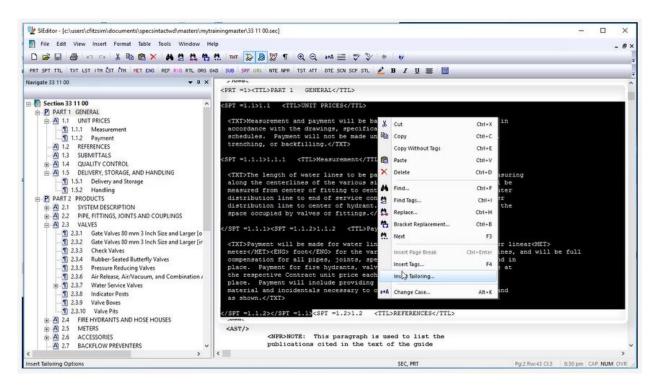
Let's go ahead and highlight the three subparts. As you see, I started highlighting before the beginning <SPT =1.1> tag, and stopped highlighting after the ending </SPT =1.1> tag.



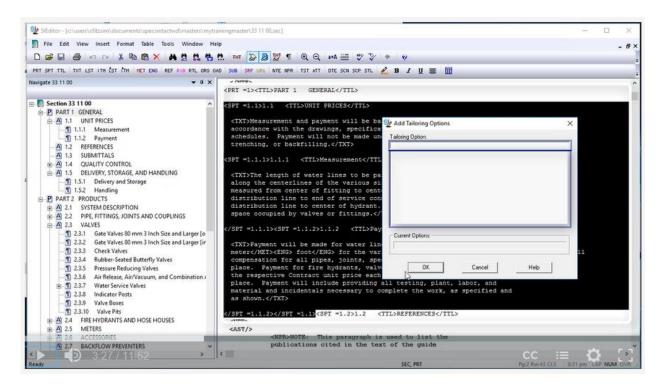
To Insert a Tailoring Option, we can either select the Insert Menu and select Tailoring, Add Tailoring Option



or we can mouse-over the highlighted area, right-click and select Insert Tailoring.



Before we start adding the Tailoring Options, let's discuss the Tailoring Options window. The field below Tailoring Option is where you will enter the new Tailoring Option.



The area directly below is where the existing Tailoring Options within the Section will be listed.

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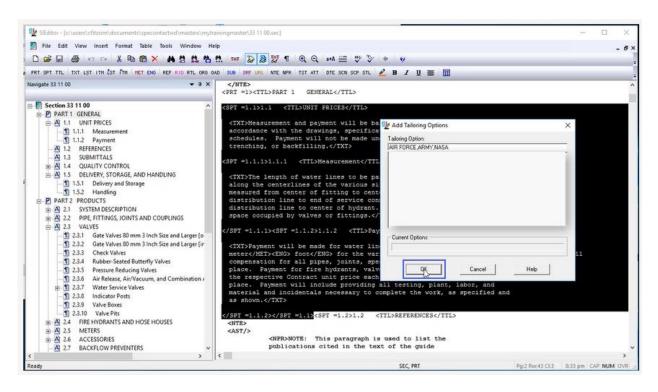
The field below Current Options will display the details of an active Tailoring Option.

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A 2.1 SYSTEM DESCRIPTION	distribution line to center of hydrant.	
- A 2.2 PIPE FITTINGS, JOINTS AND COUPLINGS	space occupied by valves or fittings. "</td <td></td>	
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1 2.3.3 Check Valves	meter <eng> foot</eng> for the var	
1 2.3.4 Rubber-Seated Butterfly Valves	compensation for all pipes, joints, spe-	
2.3.5 Pressure Reducing Valves	place. Payment for fire hydrants, valv. OK. Cancel Help	
2.3.6 Air Release, Air/Vacuum, and Combination /	the respective Contract unit price each	
2.3.7 Water Service Valves	place. Payment will include providing all testing, plant, labor, and	
1 2.3.8 Indicator Posts	material and incidentals necessary to complete the work, as specified and	
- 1 2.3.9 Valve Boxes	as shown.	
1 2.3.10 Valve Pits		
A 2.4 FIRE HYDRANTS AND HOSE HOUSES	<pre> </pre> <pre></pre>	
A 2.5 METERS	<ast></ast>	
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A 2.7 BACKFLOW PREVENTERS	publications cited in the text of the guide	
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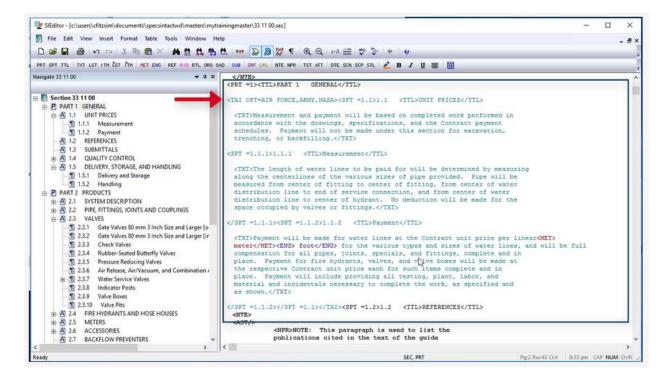
In order to see this information, your cursor must be positioned within a current Tailoring Option in order to add or remove Tailoring Options. Now that you understand the functions of the Tailoring Window, let's *place our cursor* **below Tailoring Option** and enter "AIR FORCE, ARMY, NASA."

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P PART 2 PRODUCTS	distribution line to end of service con		
PA 2.1 SYSTEM DESCRIPTION	distribution line to center of hydrant.		
A 2.2 PIPE, FITTINGS, JOINTS AND COUPLINGS	space occupied by valves or fittings. "</td <td></td> <td></td>		
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_ 1 2.3.5 Pressure Reducing Valves	place. Payment for fire hydrants, valve	OK Cancel	Help
- 2.3.6 Air Release, Air/Vacuum, and Combination /	the respective Contract unit price each		
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- 1 2.3.8 Indicator Posts	material and incidentals necessary to co	mplete the work, as specified a	and
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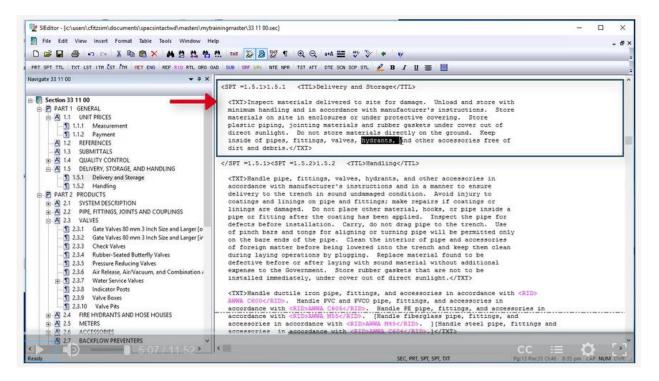
Previously, I mentioned that commas are used to define multiple Tailoring Options, so as I was entering the new Tailoring Options, I separated each one with a comma and no spaces. Now that we have the Tailoring Options entered, let's select **OK**.



The font color of a Tailoring Option is teal, which distinguishes it from other elements within the Section. In some cases, Tailoring Options can often encompass large amounts of text, so you're not always sure what Tailoring Option you may be reviewing or editing, you can simply mouse-over the text to see what the Tailoring Options are.



Let's navigate to Subpart 1.5.1. Within the paragraph, I would like to add a Tailoring Option for Hydrants. In the last sentence of the paragraph, I am going to *place my cursor before* "**and**", and type "**hydrants**, ". Now I'm going to *highlight* "**hydrants**" and the following comma and space. When adding Tailoring options, always make sure to include the appropriate punctuation and spacing within the Tailoring tags so when they are removed the designer or editor does not have to go through the Section correcting punctuation and spacing.



Now let's right-click and select Insert Tailoring,

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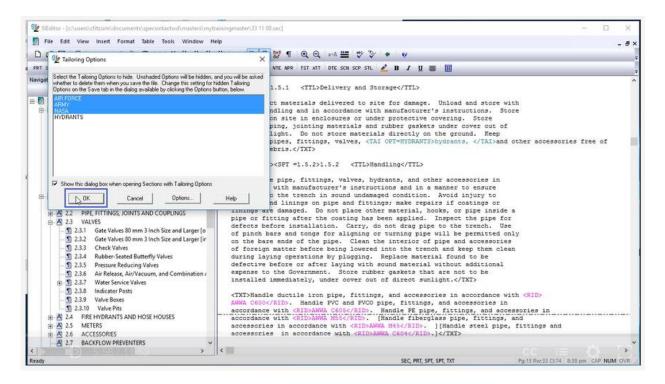
enter "hydrants" and select OK.

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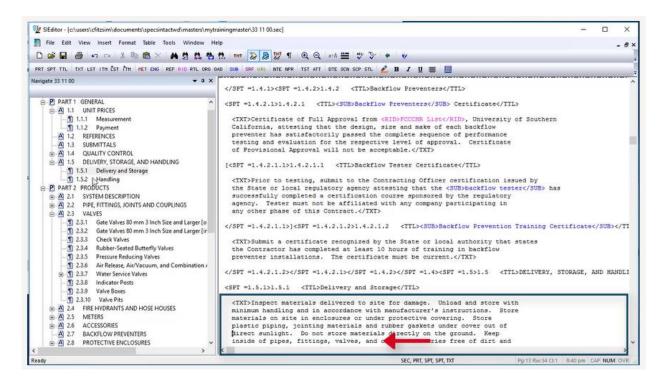
When you need to add multiple Tailoring Options within a paragraph pay close attention to the punctuation and spacing and always test your work to ensure proper alignment! To do this, go to the View Menu and select Tailoring, or right-click an area of the Section that does not contain Tailoring Tags, and select View Tailoring Options.

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Navigate 33 11 00	<pre><spt =1.5.1="">1.5.1 <ttl>Delivery and Storage</ttl> >Inspect materials delivered to site for damage. Unload and store wit minimum handling and in accordance with manufacturer's instructions. Stor materials on site in enclosures or under protective covering. Store</spt></pre>	re	
1.1.1 Measurement	direct sunright, be not store inderidits directly on the ground, meep	🖍 Undo	Ctrl+Z
A 1.2 REFERENCES A 1.3 SUBMITTALS	inside of pipes, fittings, valves, <tai opt="HYDRANTS">hydrants, </tai> and dirt and debris.	🚯 Paste	Ctrl+V
A 1.4 QUALITY CONTROL A 1.5 DELIVERY STORAGE AND HANDLING	a second s	A Find	Ctrl+F
1.5.1 Delivery and Storage	<txt>Handle pipe, fittings, valves, hydrants, and other accessories in</txt>	Find Tags	Ctrl+I
P PART 2 PRODUCTS	delivery to the trench in sound underwared condition. Avoid injury to	Replace	Ctrl+H
A 2.1 SYSTEM DESCRIPTION A 2.2 PIPE FITTINGS, JOINTS AND COUPLINGS	linings are damaged. Do not place other material, hooks, or pipe inside	 Bracket Replacement Next 	t Ctrl+B F3
A 2.3 VALVES 2.3.1 Gate Valves 80 mm 3 Inch Size and Larger [o	pipe or fitting after the coating has been applied. Inspect the pipe for defects before installation. Carry, do not drag pipe to the trench. Use of pinch bars and tongs for aligning or turning pipe will be permitted or	Remove Tags	Ctrl+M
O 2.3.2 Gate Valves 80 mm 3 Inch Size and Larger [ir ① 2.3.3 Check Valves	on the bare ends of the pipe. Clean the interior of pipe and accessories of foreign matter before being lowered into the trench and keep them clea	View Tags	Alt+S
- 1 2.3.4 Rubber-Seated Butterfly Valves	during laying operations by plugging. Replace material found to be	Diew Notes	Alt+N
2.3.5 Pressure Reducing Valves 3.6 Air Release, Air/Vacuum, and Combination /	expense to the Government. Store rubber gaskets that are not to be	View Revisions	Alt+R
1 2.3.7 Water Service Valves	installed immediately, under cover out of direct sunlight.	View English	Alt+G
- 1 2.3.8 Indicator Posts - 1 2.3.9 Valve Boxes	<txt>Handle ductile iron pipe, fittings, and accessories in accordance wi</txt>	View Metric	Alt+M
2.3.10 Valve Pits	AWWA C6004/RID>. Handle PVC and PVC0 pipe, fittings, and accessories in accordance with <rid>AWWA C6054/RID>. Handle PE pipe, fittings, and acce accordance with <rid>AWWA M554/RID>. [Handle fiberglass pipe, fittings,</rid></rid>	View Both	Alt-B
E A 2.5 METERS	accessories in accordance with <rid>AWWA M45</rid> .][Handle steel pipe,	View Tailoring Optio	ns
A 2.6 ACCESSORIES A 2.7 BACKFLOW PREVENTERS	accessories in accordance with <rid>AWWA C604</rid> .]	Insert Page Break	Ctrl+Enter
>	<	Insert Tags	F4
how or hide Tailoring Options	SEC, PRT, SPT, SPT, TXT		

From the Tailoring Options window, you will *click* on the **Tailoring Option** you want to temporarily hide, so let's *click* on "**HYDRANTS**", and select **OK**.



As we examine the paragraph, we no longer see hydrants as the option was hidden and is no longer apart of the sentence and the punctuation and spacing is correct. Always make sure to unhide them as you complete your testing!



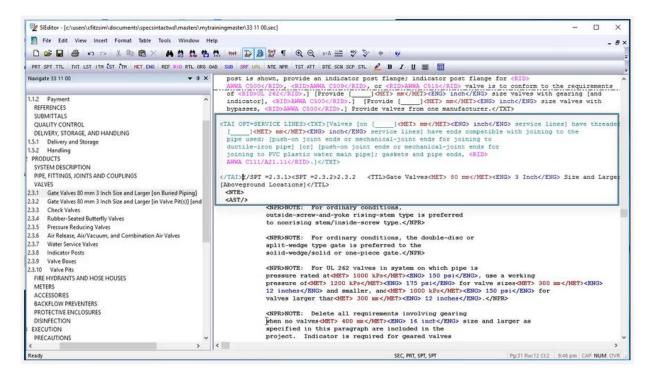
Now I would like to show you the correct way to add Tailoring Options around the last paragraph of a Subpart so the Tailoring Tag encompasses the blank line. Let's Navigate to Subpart 2.3.2 and scroll up so we can see the last paragraph. Now place your cursor before the beginning **<TXT> Tag** to highlight, stopping just before the ending </SPT =2.3.1> Tag. Right-click and select **Insert Tailoring**.

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PRODUCTS SYSTEM DESCRIPTION PIPE, FITTINGS, JOINTS AND COUPLINGS VALVES 2.3.1 Gate Valves 80 mm 3 Inch Size and Larger [in Valve Print] 2.2 Gate Valves 80 mm 3 Inch Size and Larger [in Valve Print] 2.3.2 Gate Valves 80 mm 3 Inch Size and Larger [in Valve Print] 2.3.4 Rubber-Seated Butterfly Valves 2.3.5 Air Release, Air/Vascum, and Combination Air Valves 2.3.6 Air Release, Air/Vascum, and Combination Air Valves 2.3.8 Indicator Posts 2.3.9 Valve Boxes 2.3.10 Valve Print FIRE HVDRANTS AND HOSE HOUSES METERS RACKFLOW PREVENTERS RACKFLOW PREVENTERS PROTECTIVE ENCLOSURES	Cut Ctil+X Copy Ctil+X Copy Without Tags Ctil+C Paste Ctil+X Paste Ctil+X Delete Ctil+D Find Ctil+F Find Tags Ctil+H Bracket Replacement Ctil+B Next F3 Insert Page Break Ctil-Enter	tem type is preferred type. lons, the double-disc or red to the
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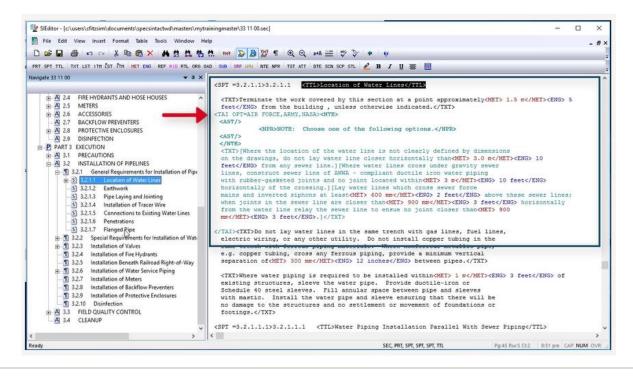
Below the Tailoring Option, let's enter Service Lines, and select **OK** or press **Enter**.

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Navigate 33 11 00 • 9 × 1.1.2 Payment REFERENCES SUBMITTALS QUALITY CONTROL DELIVERY, STORAGE, AND HANDLING 1.5.1 Delivery and Storage 1.5.2 Handling PRODUCTS	<pre>of <rid>UL 262</rid>.] [Provide []<met> mmc/ indicator], <rid>AWAA CSO0</rid>.] [Provide [] bypasses, <rid>AWAA CSO0</rid>.] Provide valves : cTXT>[Valves [on []<met>mmc/MET><eng> inch- [on []<met> mmc/MET><eng> inch-(ENG> servico pipe used; [push-on joint ends or mechanical-join ductile-iron pipe] [or] [push-on joint ends or me joining to EVC plastic water main pipe]; gaskets</eng></met></eng></met></met></pre>	<pre>WATCSIE valve is to conform to the requirements METSENGS inch (/ENGS service lines) have threaded ends.) [Valves a lines] have ends compatible with joining to the at ends for joining to chanical-joint ends for</pre>
SYSTEM DESCRIPTION PIPE, FITTINGS, JOINTS AND COUPLINGS VALVES 2.3.1 Gate Valves 80 mm 3 Inch Size and Larger [on Buried Piping] 2.3.2 Gate Valves 80 mm 3 Inch Size and Larger [in Valve Prit(s)] [and 2.3.3 Check Valves	AWWA C111/A21.11.1 C Add Tailoring Options X Takking Option SERVICE LINES ARMY A	T> 80 mm <eng> 3 Inch</eng> Size and Larger (in V
2.3.4 Rubber-Seated Butterfly Valves 2.3.5 Piressure Reducing Valves 2.3.6 Air Reduces, Air/Vacuum, and Combination Air Valves 2.3.7 Water Service Valves 2.3.8 Indicator Posts 2.3.9 Valve Boxes	HYDRANTS NASA	is preferred R> double-disc or me R>
2.3.10 Valve Pits FIRE HYDRANTS AND HOSE HOUSES METERS ACCESSORIES BACKFLOW PREVENTERS	Current Options:	on which pipe is KG> 150 psi, use a working j psi for valve sizes 300 mm <eng> 100 kPa<eng> 150 psi</eng> for > 12 inches</eng> .
PROTECTIVE ENCLOSURES DISINFECTION E EXECUTION PRECAUTIONS	OK Cancel Heb project. Indicator is required for ge	
c >		> RT, SPT, SPT Pg:31 Rw:12 Ct:1 8:46 pm CAP NUM OVR

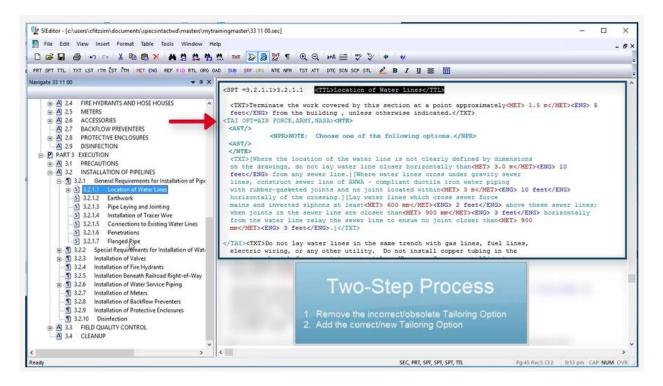
Making sure you include the proper spacing within the Tailoring tag prevents unnecessary cleanup once the Tailoring Options are removed. In some cases, you may find that you need to modify an existing Tailoring Option to either remove one of the options, add an option, or redefine an existing option. Most users think that they have to delete the existing Tailoring Option and the re-insert it, which can be time consuming, frustrating and unnecessary. In order to demonstrate the best approach, let's navigate to Subpart 3.2.1



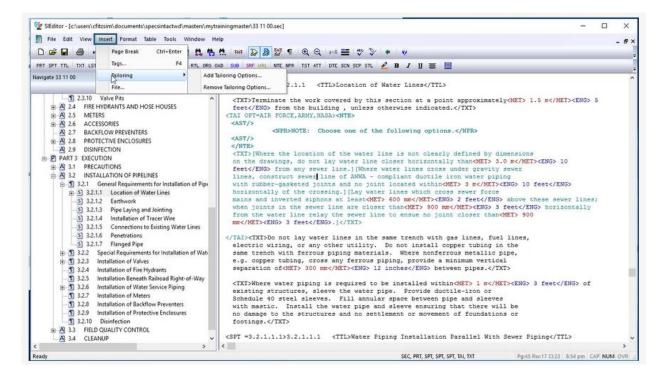
Before we begin, I wanted to bring your attention to the placement of the Tailoring Tag. Normally, the tag would be placed in front of the <TXT> Tag, but in this case, there is a Technical Note that needed to accompany the text paragraph so in this case, the Tailoring Tag began before the beginning Note Tag and ended before the beginning Text Tag of the following paragraph. When the Tailoring is removed or hidden both the Technical Note and associated paragraph will be also.



Let's go ahead and modify this Tailoring Option. As you see we currently have a Tailoring Tag for Air Force, Army, and NASA but we need to change NASA to NAVY. This is a two-step process in order to remove one option and add the other option.



In order to do this, place the cursor within the **Tailoring Option**, go to the Insert Menu and select **Tailoring**, then **Remove Tailoring Options**. When the Remove Tailoring Options window opens, the Tailoring Options will be displayed below Current Option. Before making changes, always verify these are the ones you want to modify.



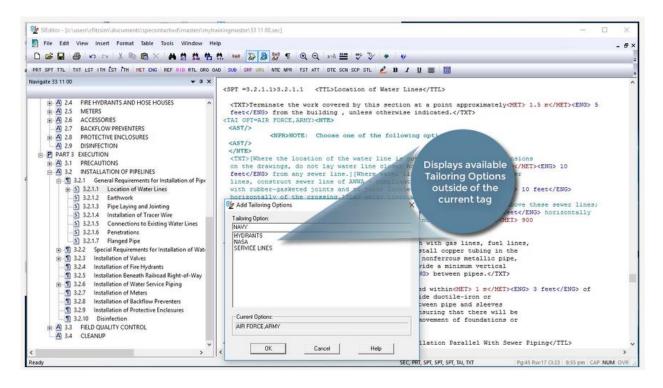
Let's go ahead and select **NASA** and then select **OK**.

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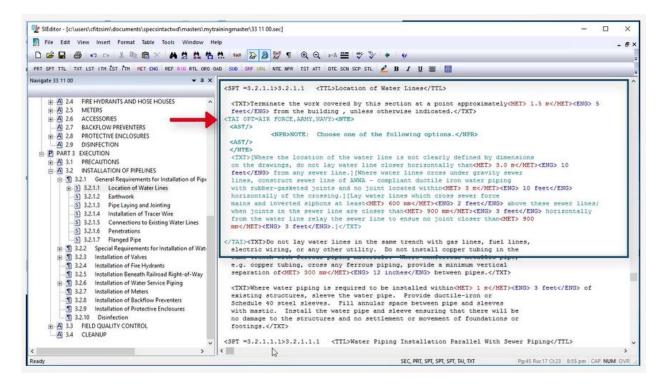
As we examine the Tailoring Tag, you will see that it now only reflects Air Force and Army. Now we are going to add NAVY, so let's go back to the **Insert Menu**, select **Tailoring**, Add **Tailoring Options**.

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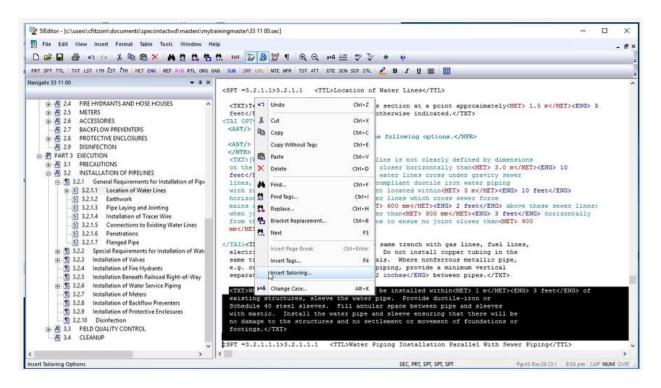
Enter NAVY then select **OK**.



The Tailoring Tag now reflects AIR FORCE, ARMY, NAVY. Modifying the Tailoring Tag is much better than going through the trouble of deleting the tag and adding it back in. As we continue, we are going to use a different technique to Tailor the last paragraph in this Subpart for AIR FORCE, ARMY, and NASA.



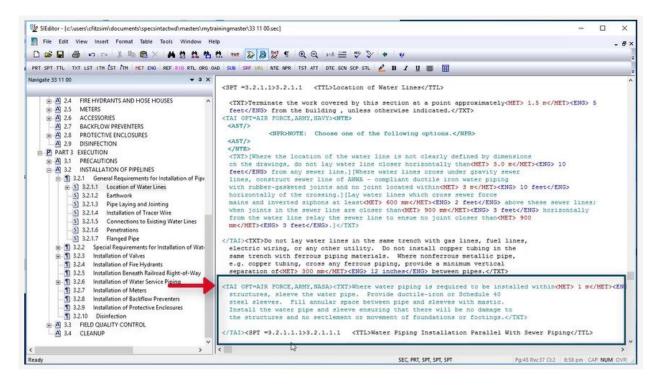
Let's position our cursor before the beginning <TXT> Tag and highlight stopping just before the beginning <SPT =3.2.1.1.1> Tag. Mouseover the highlighted area, right-click and select **Insert Tailoring**.



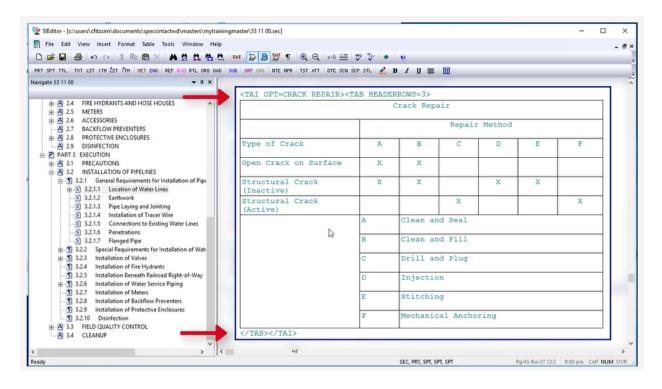
This time we are going to select the Tailoring Options from the list. Just as you can in Windows Explorer, we can use the Shift Key to select consecutive items or the Ctrl key to select non-consecutive items. Let's go ahead and *hold down* the Ctrl Key and select AIR FORCE, ARMY, and NASA. Now release the Ctrl Key and select OK.

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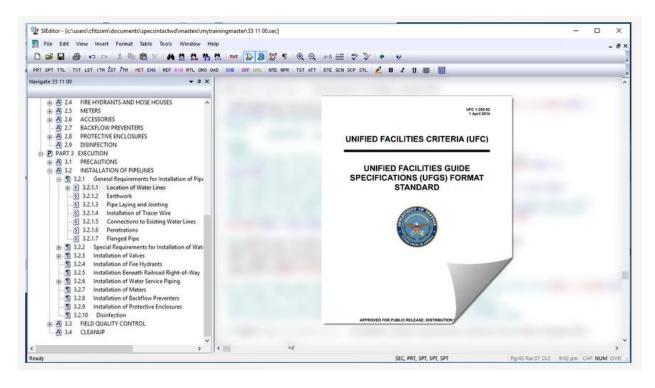
As you see, we have all three Options within our Tailoring Options Tag.



With a Formatted Table, you should apply them to the entire table and must be positioned correctly. The beginning Tailoring Tag must be on the same line as the Formatted Tables beginning Table Tag and the ending Tailoring Tag must follow the ending Table Tag.



As we complete this lesson, I would like stress how important it is to test the Tailoring Options after insertion in order to ensure the proper spacing. Since Tailoring is so complex, we cannot provide examples of all the different applications in which you may need to insert Tailoring, but now you have the foundation to insert them properly. When preparing a UFGS Master, it is imperative that you refer to the Unified Facilities Criteria (UFC) Unified Facilities Guide Specifications (UFGS) Format Standard (UFC 1-300-02). A link to this document is provided on the eLearning Modules Page under the Resources Section. This completes the lesson on inserting and managing Tailoring Options within a UFGS Master Section. 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: