

Starting a New Project

In this chapter you learn how to:

- create and name a project,
- set global options in the Summary Information dialog box,
- understand Status Boxes,
- use the Notes window,
- select sections for a project,
- open an existing project,
- copy entire projects,
- create folders,
- create new sections,
- copy sections within a project, and
- import selected sections into an existing project.

Overview

SpecLink comes with a template configuration. When you create a new project, SpecLink's Master Template is the default foundation for the new project. You can subsequently use any project as the foundation for new projects by changing the Project Source as described in this chapter.

In SpecLink, all information about a project, including all the sections in the project, is contained in a single project file. This file is an overlay over the SpecLink master database. When you make selections and edits, you are changing the overlay, but not the master in the background. When you open a project, imagine the project file as overlaying SpecLink's master database of sections, modifying your view of the contents.

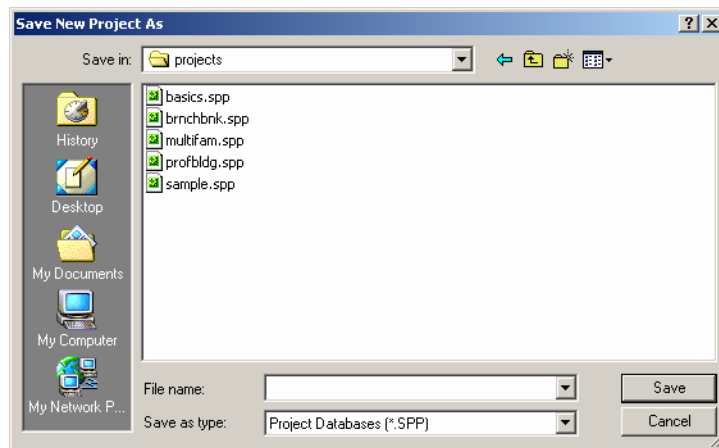
Because everything about the project is contained in a single file, global decisions such as page format and choice of units of measure can be made in one place. Links between sections are also easy to implement, so this single file structure results in better project coordination.

Creating and Naming a New Project

To prepare a project specification, you first copy an existing project or start a new project. This section describes how to create and name a new project.

1. From the File menu, choose New Project. The Save New Project As dialog box opens.

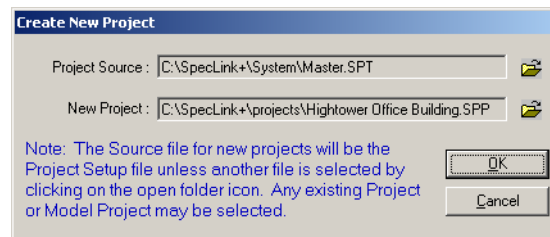
NOTE: You can also choose the New Project icon from the Standard toolbar.



This dialog box allows you to change the folder where your project will be saved. If the default folder is where you want your project to be saved, simply type the new project name in and click on Save. To change the location where your project will be saved, click on the Save In drop down menu and navigate to the folder where you want the project saved, enter a file name, and then click on Save.

NOTE: A file name can contain up to 255 characters, including spaces. But it cannot contain any of the following characters: \ / : * ? " < > |. Use a period only to separate the file name from the extension. SpecLink automatically attaches an .spp extension.

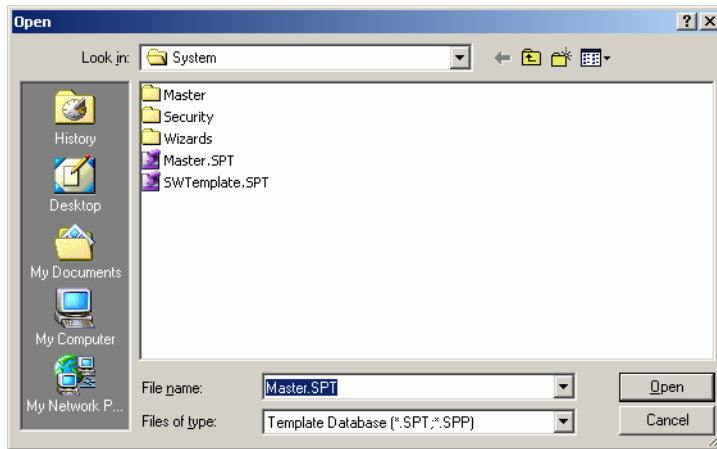
NOTE: To change the default projects directory, see the installation document located on the latest copy of the BSD SoftLink CD-ROM, or download it from our website: www.bsdssoftlink.com on the Support page.



2. The Create New Project dialog box reopens, with the path for the New Project filled in. If both the Project Source and the New Project are correct, click OK.

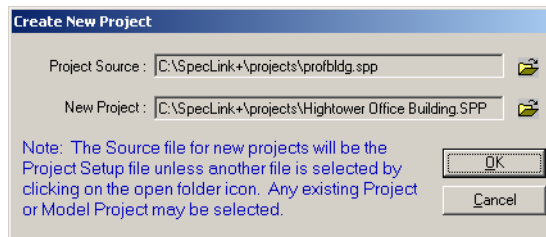
You can use any existing project or any sample or model project as the Project Source, i.e. the basis for your new project. The default project is a blank template (Master.spt) included as part of the master database. You can save editing time by changing the Project Source to an existing similar project. The Project Source will be copied and used as the starting point for the New Project.

3. To change the Project Source click on the open folder icon to the right of the Project Source field to browse. When you click on the folder, the Open dialog box opens.



Open dialog box

4. Navigate to and select the project file that you want to use as your project source.
5. Click Open. The Create New Project dialog box reappears, with the new project source.



6. Click OK to create your new project.

The Project Window for the new project and the Summary Information dialog box appear.

Once you complete the Summary Info dialog box and click OK, you have created a new project. "Setting Global Options," describes the Summary Info dialog box.

Setting Global Options

The Summary Info dialog box allows you to establish global settings for your project. Keep in mind that everything about the project is contained in a single file, allowing global settings to be made in one place. The dialog box will vary depending on whether you are in a SpecLink, PerSpecView or Short Form tab in the Project Tree before you open it.

The SpecLink Summary Info Dialog Box – General Tab

The SpecLink Summary Info dialog box contains the following global settings:

SpecLink Summary Info dialog box

File Name	Displays the file name of the project. For reference only.
File Path	Displays where the project is saved. For reference only.
Project Name	Enter a meaningful name in the Project Name field. You can print the Project Name in the header or footer of your printed specification using a keyword. This is an optional field but is useful for managing your projects. This name also appears at the top of your tree panel.
Project ID	Enter an ID number in the Project ID field. You can print the Project ID in the header or footer of your printed specification. This is an optional field but is useful for managing your projects.
Specific Terms	You can overwrite the default terms to replace all occurrences of these words in the specifications text. You can customize terms for the following: Owner, Design-Builder, Design Professional, Contractor, and Project Location. The SpecLink master database does not use the term Design-Builder, but you may want to add this term for design-build projects.

The Specific Terms appear in the Document panel in a green font, indicating a global choice. These terms can be replaced globally, in the Summary Info dialog box. You can also modify a single instance of a global term by blocking and deleting it, then entering a substitute term in your paragraph.

To overwrite a term, block the term and enter the new text.

NOTE: It is best to use generic terms (like "Owner" or "Government") instead of filling in the actual owner's name. Where the terms appear in the sections the text may say "Use the Owner's choice." If you replaced the term Owner with the owner's name, it would then read "Use the Tom Smith's choice." Not only would you then have to fix the grammar in each place where it did not make sense, but the reader would also have to figure out who Tom Smith is. In the front end documents, you will have the opportunity to fill in the owner's actual name and that is followed by "hereinafter referred to as Owner."

References SpecLink includes a single reference document—Section 01425—that includes a consolidated list of reference standards for the entire project. This list includes the acronym, the document number, the full title, and the current edition date (optional) of each standard. If you choose to include this section, links automatically include only the reference standards that are relevant to your project. There are two options that relate to reference standard citations; you can select either or both.

<i>Print Edition Dates</i>	When the section is printed, the edition dates are included with each citation.
<i>Consolidated List of Citations</i>	Check this option to produce a consolidated list of all the standards referenced in the project in Section 01425.

NOTE: To produce this list, Section 01425 must be included in the project.

<i>Include Citations in Each Section</i>	Check this option for links to automatically select the References article heading under Part 1 General when any standards documents are cited in the section.
<i>Include Related Sections</i>	Check this option for links to automatically select the Related Sections article heading under Part 1 General when any other sections are referenced in the section.

MasterFormat Version	Choose to display and print section numbers and titles in one of these four ways: MasterFormat 04, MasterFormat 95, MasterFormat 04 (MasterFormat 95 in parentheses) or MasterFormat 95 (MasterFormat 04 in parentheses). Click on the button for the option you want. If you choose to show a secondary hierarchy in parentheses, only the secondary section number will be displayed. Only the section title for the primary hierarchy will display and print. MasterFormat Version choices normally appear in the Document panel in a green font, indicating that the format is set globally in the Summary Info dialog box. However, where section titles are part of MasterFormat Version option, they appear in a blue font. The blue choice type allows you to use a fill-in the blank choice type when you want to input your own section title.
MF-04 Section ID Format	Choose to display and print the MasterFormat 2004 section numbers in one of these three ways: 99 9999, 99 99 99, or 999999. You can also select a separator to separate the digits if choosing 99 99 99 or 99 9999.
Unit of Measure	Choose to display units of measure in one of these four ways: English (Metric), Metric (English), English, or Metric. Click on the option button for the option you want. Units of measure normally appear in the Document panel in a green font, indicating that the format is set globally in the Summary Info dialog box. However, where units of measure are part of multiple choice options, they appear in a blue font.

NOTE: When a unit of measure value is entered in a fill-in choice, the software does NOT convert it to the other forms or units; you must enter the value.

The Summary Info Dialog Box – Report Cover Sheet Tab

The contents in the fields on this tab will print on a Cover Sheet when any of the Requirements Reports are printed. The cover sheet can be suppressed by un-checking the Reports Cover Sheet checkbox on the Reports Setup Dialog box.

Allow BSD to Publish Project Data – This checkbox defaults to being checked when you create a new project or when you copy an existing project. When this field is checked, you are giving your permission for BSD to publish the information about your project, including your company name, in reports generated and distributed to a limited number of manufacturers who pay to receive this information for specific specification sections.

The PerSpective and Short Form Summary Info Dialog Box

The PerSpective and Short Form Summary Info dialog box contains the following global settings:

Summary info for Professional Building

General

File Name: profldg.spp
File Path: C:\SpecLink+\projects

Project Name: Professional Building
Project ID: 090104

Specific Terms

Owner: Owner
Design-Builder: Design-Builder
Design Prof: Architect
Contractor: Contractor
Project Location: the State in which the Project is located

Document Function

☒ Building Design Criteria
☐ Proposed Performance Specifications
☐ Construction Documentation

References

☒ Print Edition Dates
☒ Consolidated List of Citations

Unit of Measure

☐ English ☒ English (Metric)
☐ Metric ☐ Metric (English)

OK Cancel

PerSpective and Short Form Summary Info dialog box

Most of the fields on the Summary Info Dialog Box for PerSpective and Short Form are the same as the fields in the SpecLink Summary Info Dialog Box. The following highlights only the differences.

Document Function	PerSpective includes a global switch that changes language throughout the database, depending on the intended use of the documents. Choose the appropriate function from the three that are offered, as follows: Building Design Criteria (an owner preparing an RFP), Proposed Performance Specifications (a design-builder responding with a proposal), or Construction Documentation (communications between members of the building team).
References	PerSpective includes a single reference document—Section 00840—that includes a consolidated list of reference standards for the entire tab. This list includes the acronym, the document number, the full title, and the current edition date (optional) of each standard. If you choose to include this chapter, links automatically include all the reference standards that are relevant to your project. There are two options that relate to reference standard citations; you can select either or both.
Print Edition Dates	When the section is printed, the edition dates are included with each citation.

Consolidated List of Citations Check this option to produce a consolidated list of all the standards referenced in the project in Section 00840.

NOTE: To produce this list, Section 00840 must be included in the project.

Completing the Summary Info Dialog Box

You can establish global settings in the Summary Info dialog box when you first start a new project, and change these settings at any time. To view or edit the Summary Info dialog box later, from the File menu choose Summary Info, or click the *Open Database Summary Info dialog* button on the toolbar.

1. To add or edit the data in any field in the Summary Info dialog box, click on the field.

NOTE: The File Name and File Path fields are for reference only. They cannot be edited.

2. Enter your new text. Use the Tab key to navigate through the fields or click on each field to edit it.
3. To change an option, click on the radio button or checkbox to select or deselect.
4. When you have completed desired changes in the Summary Info dialog box, click OK.

Notes about Specific Terms

When you replace specific terms in the Summary Info dialog box, keep these hints in mind:

- Any words can be used, but the sentence syntax and punctuation assume that nouns or proper nouns are used, and that possessives and other structures may be appropriate.
- The duties of each entity, and what the specification says each is responsible for, are based on contractual relationships similar to those provided for in the standard American Institute of Architects (AIA), Associated General Contractors of America (AGC), and Engineers Joint Contract Documents Committee (EJCDC) contracts for design-build projects.
- If the contractual relationships for the project are different from the standard AIA, AGC, and EJCDC relationships, substitution of a different set of names may not be sufficient to clarify modified responsibilities. In that case, it is advisable to examine each section for statements relating to the duties of the parties to the contract and to make modifications as necessary. If necessary, use the *Find* feature to search for specific terms.

Basic Concepts

Unlike documents in a word-processing environment, where unwanted text is deleted to remove it, in SpecLink you select a section by clicking on its status box in the Tree panel to include it (or by clicking the status box of the title in the Document panel). Unselected sections are not included in your project and do not print. In addition, as you make text selections in the Document panel, software links automatically make other changes to the section and to other sections in the project. See the "Status Boxes" section in Chapter 3 for details about selected text.

In the Tree panel, folders that contain active sections have a sheet icons (). When those folders are expanded, the sections that are included in the project are in a bold font. In addition, the status boxes of included sections are green, include a checkmark, or are green with a checkmark.

NOTE: A selected section is always included in the project. If you wish to exclude a selected section, simply click again on the status box adjacent to the title. Click again to return section status to neutral.

Status Boxes

The status of each paragraph in a section is visually displayed in the box in the Status column to the left of the text in the Document panel, and the status of each section is visually displayed in the status box to the left of each document title in the Tree panel using symbols and colors. For complete descriptions of the symbols and colors, see Chapter 3.

Using the Notes Panels

To help you choose sections to include, the title of each section always has a note attached that includes a brief description of the section contents. To view the Notes, click on the name of the section you want to review and the note will appear in the master notes panel. (If the master notes panel is not visible, select it from the View menu.)

To see the note on a different section, click on the name of the section you wish to view, and the Master Notes panel will display the notes for the section you select. You can therefore move quickly from section to section in the Tree Panel and see a quick overview of the section in the Master Notes panel.

When a section is open, Notes attached to particular paragraphs appear in the Notes panel when the relevant paragraph has focus and the Notes panel is open. Paragraphs that have Notes are marked with an icon in the Notes (N) column to the left of the status box. The color of the icon indicates the type or types of notes available, as follows:



Yellow notebook icon on left

Master note is attached



Blue notebook icon on right

Project note is attached



Both the yellow and blue notebook icons

Both master and project notes are attached

NOTE: For information on adding your own notes, see Chapter 5.

Selecting Sections for a Project

Once you have created a new project or opened an existing project, you can select sections to include and deselect sections that are not needed. You can also exclude sections, but it is not necessary to exclude them from your project to keep them from printing. Only selected sections, displayed with bold titles, are included in your project.

1. To select or deselect a section, click once in its status box in the Tree panel, or click the status box of the section title in the Document panel. Remember that selected sections display the status box with a checkmark, a green background, or a combination of a checkmark and a green background. The title of the selected section is also displayed in a bold font.

2. If you decide that you do not want a section that you selected, click the status box twice to return it to a neutral status.

See the "Status Boxes" section of Chapter 3 for a refresher about the status box color and symbol markings.

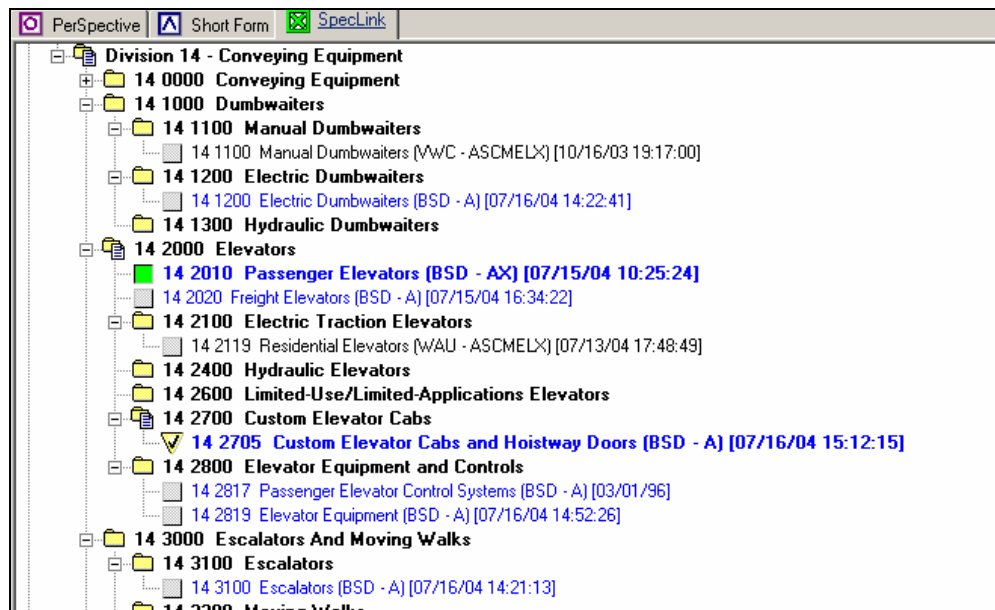
3. Continue selecting the sections you want.

You can add or deselect sections at any time.

NOTE: You can make section selections in the Tree Panel without actually loading the document into the Document Panel. This makes your selections faster. To load the section in the Document Panel, click on the section title in the Tree Panel.

Which Sections are Included?

Active sections, which are included in the project, have titles in a bold font, while inactive sections are shown in a normal font. Also, the status box of an active section is either green or includes a checkmark, as shown in the following illustration.



Selected sections in a project are indicated by titles in **bold font**

Notice in this example that one section (14 2010 Passenger Elevators) has been selected automatically by a green link. Also notice that section 14 2705 Custom Elevator Cabs and Hoistway Doors was highlighted by the system (yellow triangles) and selected manually by the user (checkmarks). Other documents in this view have not been selected by either the user or the system (the Status box is a neutral gray square) and are not currently included (the section titles are in a normal font).

The information in parentheses following each document title indicates the source of the document and the catalogs that have access to it. For example, 14 1100 Manual Dumbwaiters (VWC - ASCMELX) is a proprietary section authored by VWC (Vincent Whitney Company, Inc.) and is part of the Architectural, Structural, Civil, Mechanical & Electrical, Landscape, and Basics catalogs. The second set of parentheses indicates the last date and time the section was edited.

Non-proprietary sections are authored by BSD and appear in the tree in blue font. Proprietary sections that are based on the products of a particular manufacturer appear in the tree in a black font. Sections that have been added by the user or master sections that have been copied appear in a green font. Sections that are not available for you to edit because they are being edited by other users appear in a gray font, and information in the parentheses is replaced with "in use by." A gray font will also appear on sections that are not included in your subscription catalog.

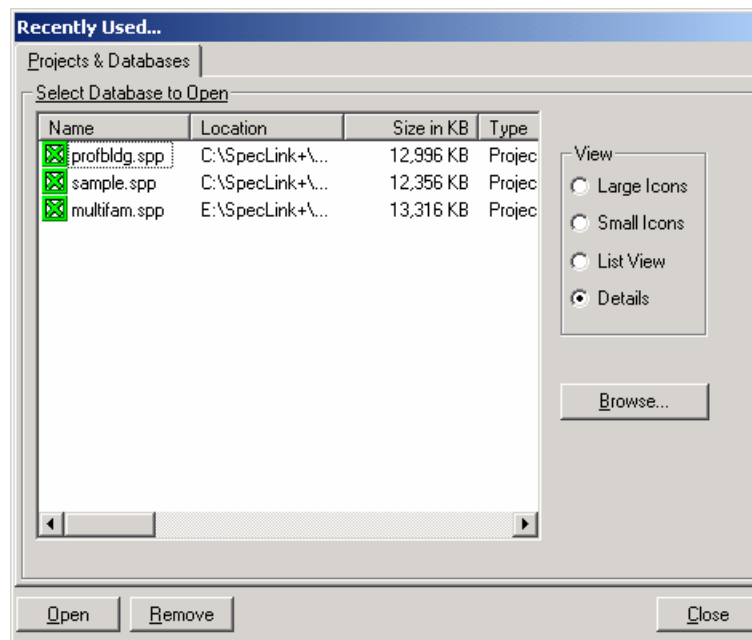
NOTE: If the status box of a gray “in use” section is replaced by a red key, that section is currently checked-out by another user. See Chapter 9 for details.

Opening an Existing Project

1. From the File menu, choose Open Project.

NOTE: You can also choose the Open Project icon from the Standard toolbar.

The Recently Used dialog box opens. Note that there are four different views of the recently used projects available. The view below shows Details of the files.

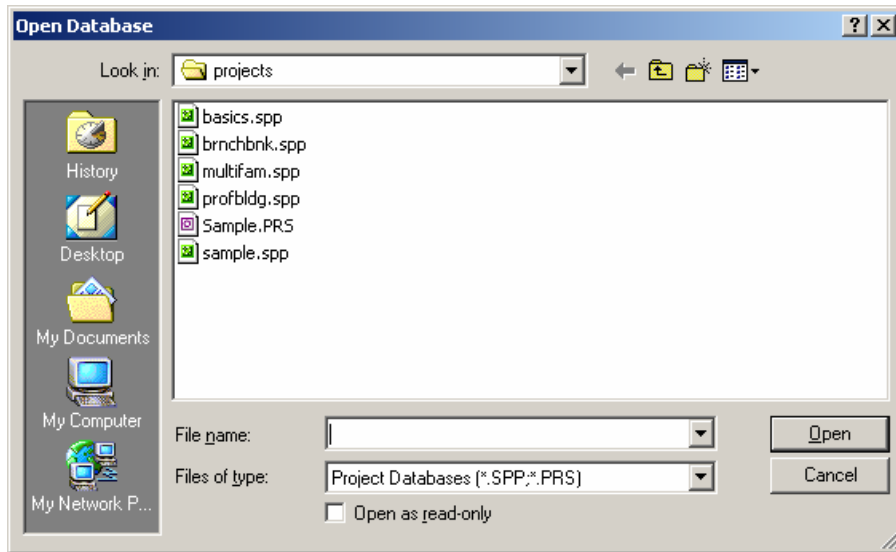


Recently Used dialog box

2. You can select a project from those presented in this window, or if the project you want to open is not listed, click the Browse button to open the Open Database dialog box.

If you click Browse, the Open Database dialog box opens to the default projects directory.

NOTE: As a shortcut, the last four projects used display at the bottom of the File menu. If you want to open one of those files, click on it.



Open Database Dialog Box

3. Go to the location of the project file you want to open, click on the file, and then click the Open button.

The project file opens.

Reusing Existing Projects

You can get a “jump start” on a new project by reusing previous work. Copy entire projects or individual sections from projects. With SpecLink, reusing the specifications from previous projects is actually the best way to improve your productivity. Here’s why:

- No master text is ever deleted; it is always available for the next project.
- New material added for a project is carried forward to the next project automatically and can be deselected if not relevant.
- Notes are in a separate panel, not in the body of the document. (In a word processor, the notes would be in the body of the document and may be deleted from the original project. With SpecLink, the notes are stored separately from the text and would not be deleted.)

There are three methods for copying projects:

- Changing the Project Source to an existing project (as described earlier in this chapter under creating new projects)
- Copying an entire project (described next)
- Importing sections from existing projects (described in the next section of this chapter)

The first two result in the same file - an exact copy of the original project. The third method allows you to import only the specific sections that you need.

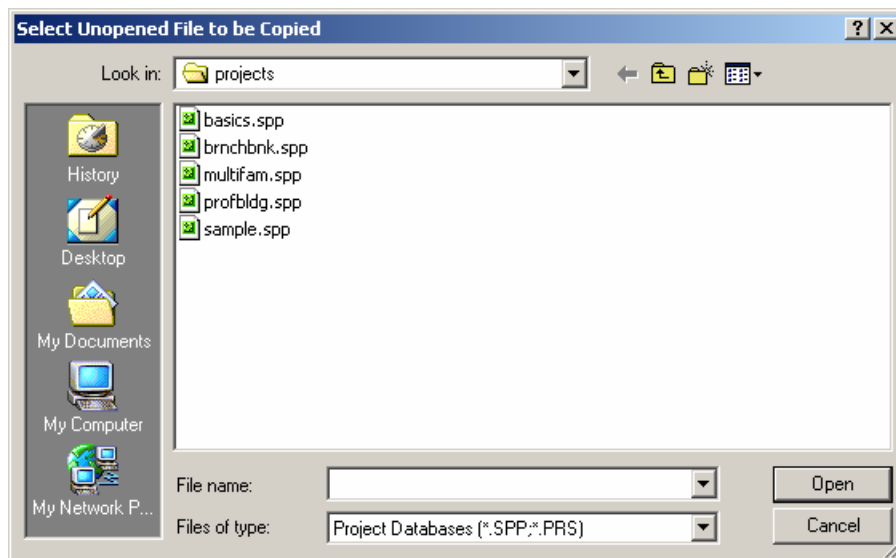
NOTE: It may not be possible or desirable to reuse the last project specification, because more than one project may be in the works at the same time. In that case, a "master project file" offers the same benefits with only a slight increase in administration. By using Copy/Paste, and Import From Project, new material can be added quickly to the master project file from new projects. See Chapter 10 "Creating a Master Project File" for details.

Copying an Entire Project

To copy an entire project including Summary Info settings, formats, and all selections and edits, use the following steps:

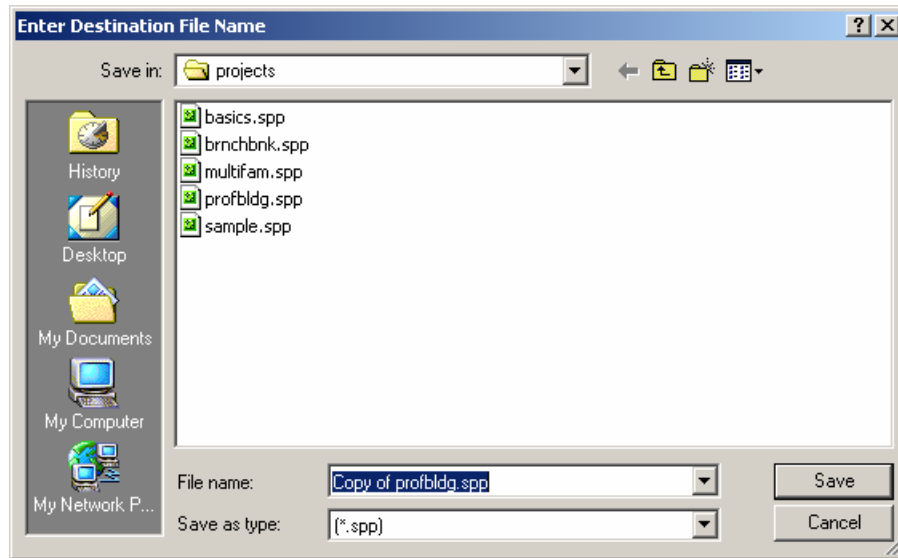
1. From the File menu, choose Copy Project.

The Select Unopened File to be Copied dialog box opens.



Select Unopened File to be Copied Dialog Box

- Go to the location of the file you want to copy, click on the file, and then click Open.
The Enter Destination File Name dialog box opens.



Enter Destination File Name Dialog Box

- Select a different folder in which to save the copy, if desired. Then enter a file name, and then click Save.
The copy will be made.
- To open the copy, from the File menu choose Open. The Recently Used dialog box opens. Since the copied project has never been open before, it will not be listed. Click the Browse button to locate and open the copy.
- Open the Summary Info dialog box (from the File menu, choose Summary Info) and edit the global settings to match the new project.

NOTE: The Copy Project procedure does not change the Project Name of the copied project to match the file name. To change the name of the project, open Summary Info.

Managing Sections In a Project

SpecLink allows you to create new folders, copy existing sections, create new sections, and import selected sections from one or more projects into a new project. These features

allow you to take copy research performed for earlier projects into new projects, create new sections, and create new folders to better meet the scope of your new project.

Adding Folders To the Tree

The folders in the tree correspond to one of four possible hierarchies: MasterFormat 95 or MasterFormat 04 for SpecLink, UniFormat for PerSpective and MasterFormat 95 for Short Form Specifications.. These folders therefore are intended to cover all possible construction materials and systems. However, SpecLink allows you to add your own folders to the tree.

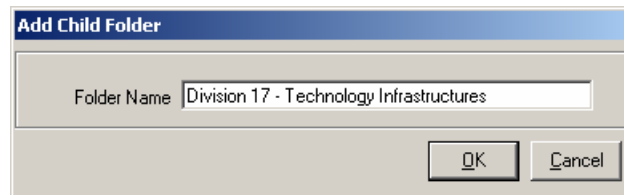
A new folder will be inserted in the tree at the position determined by your cursor location and the command you use to add the folder. To add a child folder that should be listed last, click on the parent folder and select the command Insert Child Folder. To add a folder in the middle of a branch (instead of last), click on the existing folder that is below where you want the new folder, and select the command Insert Folder.

Adding a New Folder to the Bottom of the Tree

To add a Division 17 folder to the tree in MasterFormat 95, perform the following steps:

1. In the Tree Panel, click on the Project title at the top of the Project Tree.
2. From the Tree menu, choose Folders, and then Insert Child Folder...

The Add Child Folder dialog box appears.



Add Child Folder dialog box

3. Enter the title of your new folder (in this case, Division 17 – Technology Infrastructures), then click OK.

The new folder is added at the bottom of the tree, just above the Unassigned Sections folder.

Renaming and Deleting Folders

You can rename any folder or delete a folder you have added at any time. To rename any folder or to delete a user-added folder, first click on the folder, then from the Tree Menu,

choose Folder, and then choose Rename Folder or Delete Folder. The folder must be empty in order for you to delete it.

Adding New Sections

No matter how many sections are in the master database, there may be a need for additional sections. SpecLink includes four ways to add new sections.

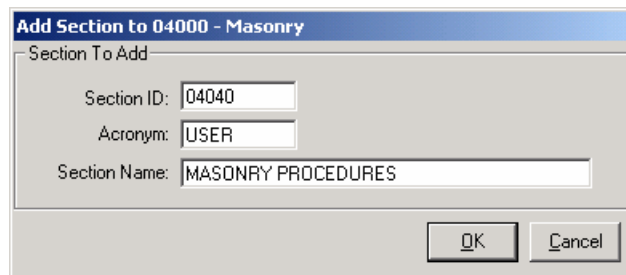
- The **Add New Section** function allows you to create new sections built on a template with all major article headings and standard "boilerplate" text. Use this method if you are going to type in the text or copy in small parts of the text from another document.
- **Add New Section From RTF File** allows you to use the complete section from another document, such as Word or WordPerfect.
- **Copy Section** copies existing sections from within the same project.
- **Importing sections** from another project is the fourth way to get a new section into your project.

Add New Section

To create new sections, you follow a procedure similar to adding new folders:

1. Position your cursor in the Tree Panel on the folder that will contain your new section.
2. Using your right mouse button menu click on Add New Section or from the Document menu, select Sections, then Add New Section...

The Add Section dialog box opens.



Add Section dialog box

3. Enter a section ID and section name, then click OK. You may also change the acronym, but we recommend leaving it as USER for easy identification.

NOTE: The software will not allow you to add a section number/acronym combination already in use in the master database or in your project. If you add a section in the wrong place, use Cut Section and Paste Section to move it (see details later in this chapter).

The new section is added to the Tree Panel in the appropriate location, based on the number and acronym assigned.

4. Click the status box adjacent to the title to include the new section in the project, and edit the content just as you would a master section.

NOTE: Sections in SpecLink are numbered and titled in accordance with the 1995 or 2004 edition of CSI's *MasterFormat*™ – *Master List of Numbers and Titles for the Construction Industry*. To be consistent with this numbering scheme, we strongly suggest you acquire a copy of the appropriate document from CSI.

The SpecLink Section Template

The template copied by the Add New Section command (while in the SpecLink tab) is the CSI Three-Part Section Format, including PART and Article headings down to level 2, plus standard language for many PART 1 and PART 3 topics.

Listed below are the Article titles provided in the SpecLink template, which should be used to the degree possible. The 3 PARTs are always used. Articles marked with an asterisk are almost always used.

PART 1 GENERAL
 SECTION INCLUDES*
 RELATED SECTIONS*
 ALLOWANCES
 UNIT PRICES
 ALTERNATES/ALTERNATIVES
 REFERENCES*
 DEFINITIONS
 SYSTEM DESCRIPTION
 DESIGN REQUIREMENTS
 PERFORMANCE REQUIREMENTS
 SUBMITTALS*
 QUALITY ASSURANCE*
 MOCK-UP
 PRE-INSTALLATION MEETING
 DELIVERY, STORAGE, AND PROTECTION
 PROJECT CONDITIONS
 ENVIRONMENTAL REQUIREMENTS
 WARRANTY
 EXTRA MATERIALS
 MAINTENANCE SERVICE

PART 2 PRODUCTS
 MANUFACTURERS*
 [BASE BID] MANUFACTURER

MATERIALS*
[PRODUCT]
[COMPONENTS]
ACCESSORIES*
MIXES
FABRICATION
SHOP FINISHING
SOURCE QUALITY CONTROL [AND TESTS]

PART 3 EXECUTION

EXAMINATION*
PREPARATION*
INSTALLATION*/APPLICATION/ERECTION
INTERFACE WITH OTHER WORK
ERECTION TOLERANCES
FIELD QUALITY CONTROL
STARTING EQUIPMENT [AND SYSTEMS]
ADJUSTING
CLEANING AND PROTECTION
SCHEDULES
END OF SECTION

Since the new section does not exist in SpecLink's master database, all of the paragraphs will be user-added paragraphs, and therefore completely editable. Notes are included in the Section Template to explain how to use each article so that new sections you create can be consistent with the existing sections.

Copying the Section Template

When you add a new section in the SpecLink tab, SpecLink copies the SpecLink Section Template, Section 99999 (9 99999 in MF04). If there are edits you would have to make for every new section you create, customize Section 99999 or 9 99999 just as you would edit any other section. You can copy text from the Section Template to other sections. When you add a new section while in a PerSpective or Short Form tab, the PerSpective Section Template will be copied. See below for the PerSpective/Short Form Section Template.

#	LVL	N	O	S
0000				
0001				
0002				
0003				
0004				
0005				
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0007				
0008				
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0011				
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0016				
0017				
0018				
0019				
0020				
0021				

SECTION TEMPLATE

PART 1 GENERAL

SECTION INCLUDES

[]

RELATED SECTIONS

Section [] - []: []

ALLOWANCES

See Section 01210 - Allowances, for **cash** allowances affecting this section.

UNIT PRICES

See Section 01270 - Unit Prices, for additional unit price requirements.

[]: By the **linear foot**. Includes []

ALTERNATIVES

See Section 01230 - Alternatives, for product alternatives affecting this section.

This section describes a base bid product; refer to Section [] for an alternative product.

This section describes an alternative product; refer to Section [] for the base bid product.

REFERENCES

FM P7825 - Approval Guide; Factory Mutual Research Corporation; **current edition**.

NEMA MG 1 - Motors and Generators; National Electrical Manufacturers Association; **1998**

NFPA 70 - National Electrical Code; National Fire Protection Association; **2002**.

SSPC-Paint 15 - Steel Joist Shop Paint; Society for Protective Coatings; **1999 (Ed. 2000)**.

DEFINITIONS

[]: []

Section 99999 – SpecLink Section Template

PERFORMANCE SECTION TEMPLATE

PERFORMANCE

Basic Function:

Amenity and Comfort:

Health and Safety:

Structure:

Durability:

Operation and Maintenance:

PRODUCTS

[]:

Use one of the following:

[]

Do not use:

[]

METHODS OF CONSTRUCTION

The following other existing elements **must** be preserved:

[]

The following other existing elements **must** be removed to accomplish new construction:

[]

Construct using one of the following methods:

[]

Do not use:

[]

END OF SECTION

The PerSpective and Short Form Section Template

Add New Section from RTF File

If you already have the section you want to add in a word processing or RTF (rich text format) file, it is faster to create a new section using Add New Section from RTF file.

There are two settings on the Tools menu that need to be set correctly before you use Add New Section from RTF. If you have Auto-Select New Paragraphs turned on, then all paragraphs imported during the Add New Section from RTF will be selected with a checkmark. There is a menu selection called Look for Choice Fields in Import. If this is turned on (reflected by a checkmark in the menu choice) then the import will create choices within the section, based on the formatting outlined below. If the Look for Choice Fields in Import is not turned on, then the software will not create choices in your section and brackets will import as brackets, for example. Unless you have specifically edited your file to import choices, it is better to leave this selection off. See below for more information on importing choices.

Your RTF file must be formatted correctly for the new section to be added correctly. The following guidelines should be followed:

- The file must be a true RTF file. To save a word processing document as an RTF file, open it in your word processing software and choose Save As, selecting Rich Text Format (RTF) as the file type.
- The word "Section" must be in the first non-blank line in the document.
- This word must be followed by one or more spaces followed by the Section ID number. Up to 15 characters are allowed. MasterFormat 95 Section IDs may only be 5 characters in length.
- The number may be followed without space by an acronym (If no acronym is discovered the acronym will default to "USER").
- The Section Title is expected to be the second non-blank line in the document. A properly delimited note (see below) may precede the Section ID or the Section Title and will be assigned to the Section Title.

Any or all of the above information can be edited in the dialog box following file selection.

Example of first two lines of an RTF file:

Section 07550
MODIFIED BITUMEN ROOFING

- Paragraphs beginning with the word “Part” and one of the words “General”, “Products” or “Execution” will import at Level 1. The test is not case-sensitive.
- Other levels (hierarchy) are determined basically by the amount of space between the left margin and the first printable character on the line, regardless of how the space was created.
- Since SpecLink has its own auto-numbering system, the import from RTF attempts to remove numbers and letters from the beginning of a line. From the beginning of a line up to five characters followed by a tab will be recognized as an auto-number to be removed.
- When a paragraph is indented 2 or more levels below its parent it will be promoted until it is only one level below its parent.
- Lines beginning with 10 or more asterisks will be recognized as the boundary beginning or ending text that should be treated as a Note to the following paragraph. To import a note on a paragraph, it should be formatted like this:

This is the project note for Paragraph One

Paragraph One

- Blank paragraphs in specification text are discarded; blank lines within notes are maintained.
- The phrase “End of Section” is assigned to Level 1. If there is no End of Section at the end, it will be added by SpecLink.

Note: If the phrase End of Section is anywhere within the RTF file, SpecLink will consider that to be the end of the section and will not import the remainder of the document.

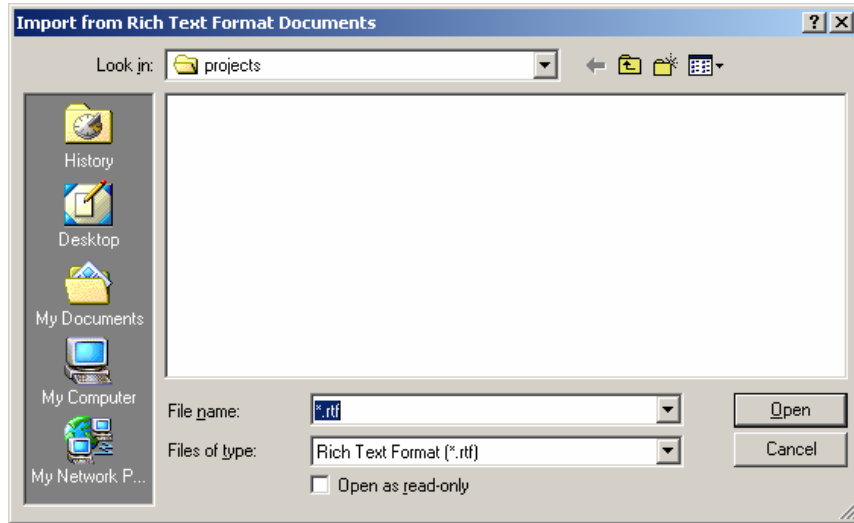
Additional notes about import:

- Documents with paragraph marks at the end of every line, instead of only at the end of paragraphs, should be cleaned up before importing, since each line will import as a new paragraph.
- Hard line breaks are treated as new paragraphs. If you don't want a paragraph numbered in SpecLink, drag across the paragraphs once they are in SpecLink and from the Document menu choose No Auto Number.
- SpecLink does not import tables from Word directly. You need to convert tables to tabbed text before importing.

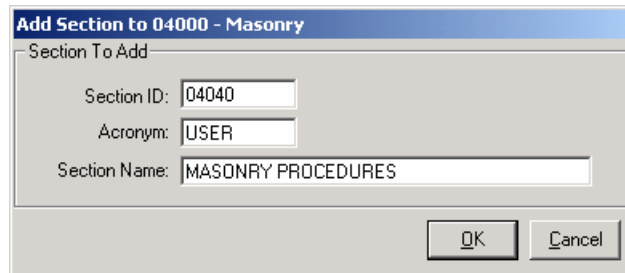
To create a new section using Add New Section from RTF File, use the following steps:

1. Position your cursor in the Tree Panel on the folder that will contain your new section.
2. Using your right mouse button menu, select Add New Section from RTF File... or from the Document menu, select Sections, then Add New Section from RTF File...

The Import from Rich Text Format Documents window opens



3. Navigate to the folder where the RTF file is, click on it and then click on Open.
The Add Section dialog box opens.



Add Section dialog box

4. Enter a section ID and section name, then click OK. You may also change the acronym, but we recommend leaving it as USER for easy identification.

NOTE: The software will not allow you to add a section number/acronym combination already in use in the master database or in your project. If you add a section in the wrong place, use Cut Section and Paste Section to move it (see details later in this chapter).

The new section is added to the Tree Panel in the appropriate location, based on the number and acronym assigned.

The Rules for importing Choices

In the table below are the proper formats for choices you wish to import into SpecLink. Note that these conventions will be honored only if you have the Tools menu choice of *Look for Choice Fields in Import* turned on. Also note that if this choice is active, choices will be imported when you use Add New Section from RTF, as well as when you use Import from Clipboard (Control-V).

Description	Marker	Note
Exclusive Choice List	[[apple] [orange] [banana]] or [[apple] [orange] [[]]]	Used as selection for no optional text
Optional Text	<<apple>>	User can select text or None – N/A
Optional, One required, AND	~~and<<apple>><<orange>> <<banana>>~~	Must pick at least one, can pick more, AND connector
Optional, One required, OR	~~or<<apple>><<orange>> <<banana>>~~	Must pick at least one, can pick more, OR connector
User Defined Fill-in	[]	User fills in
Reference Date	<date>	
Owner	#O#	Globally defined term for Owner
Design Builder	#D#	Globally defined term for Design Builder
Design Prof	#A#	Globally defined term for Design Professional
Contractor	#C#	Globally defined term for Contractor
Project Location	#S#	Globally defined Project Location
Unit of Measure	{{cubic feet (cubic meters)}} or {{{[inch][foot][yard]}([cm][meter][meter])}}	Globally defined unit of measure

Description	Marker	Note
MasterFormat Version Choice (MFV)	Section {+{MF04 (MF95)}} Section {+{[[MF04] [____]] ([[MF95] [____]]))}}	Format the MF04 number as 00 0000 -- the space is required. The first character in the import must be something other than the initial brace.
PerSpective Document Function	[+[Text for Building Design Criteria] [Text for Proposed Performance Specifications] [Text for Construction Documentation]]	The three options correspond to the Document Function setting on the PERSPECTIVE Summary Info dialog -- may be used in PerSpective and Short Form only. (In SpecLink it imports but does not switch -- the first option shows.)

NOTE: See “User-Added Choices” in chapter 5 for how to edit, delete, and add choices within SpecLink.

Copying Sections Within a Single Project

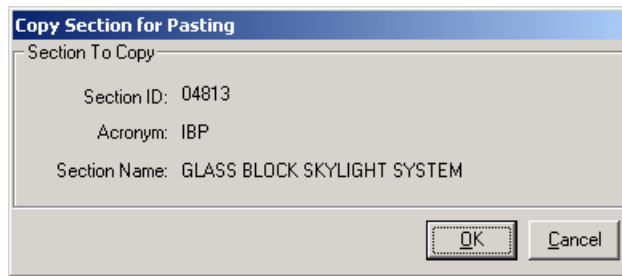
Copy an entire section within a single project when you need to make two variations of the same section in the same project, or if you want to copy a proprietary section and edit it to make it generic. Copy the section to a new acronym, and then edit the new section.

NOTE: To copy sections from one project to another, see Importing Sections Into a Project later in this chapter.

To copy an entire section within a single project:

1. In the Tree panel, click on the title of the section to be copied.
2. Using your right mouse button menu, click on Copy Section or from the Document menu, point to Sections, and then click Copy Section.

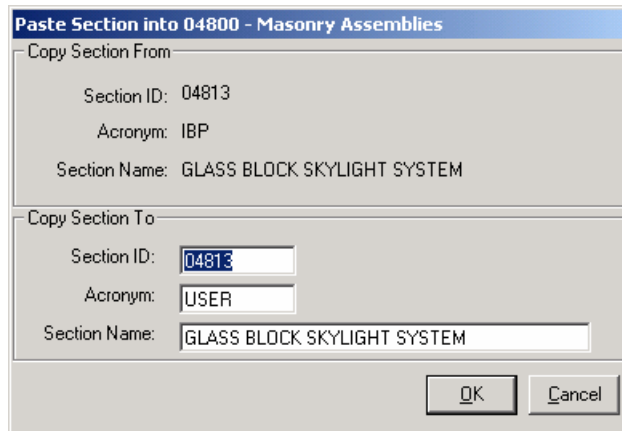
The Copy Section for Pasting dialog box opens. The current Section ID, Acronym, and Section Name are displayed.



Copy Section for Pasting dialog box

3. Verify that this is the section you want to copy, then click OK to proceed.
4. In the Tree panel click on the folder that will contain the pasted copy.
5. Using your right mouse button menu click on Paste Section Into... or from the Document menu, point to Sections, and then click Paste Section Into....

The Paste Section Into... dialog box opens.



Paste Section Into... dialog box

6. The *Copy Section To* portion of the dialog box defaults to the current section ID and Name. The Acronym is changed to USER to indicate that it is a user added section. If desired, change the Section ID, Acronym, and/or Section Title. Then click OK.

The copied section appears in the Tree panel with its new section number and/or title.

NOTE: If you mistyped the name, in the Document panel, drag the pointer across the current name to highlight it and then type the correct name. Click on a different paragraph to save your edit and the name will update in the Tree panel. If the Section ID or Acronym is wrong, use the *Moving a Section* steps below to Cut and Paste the section.

Moving a Section

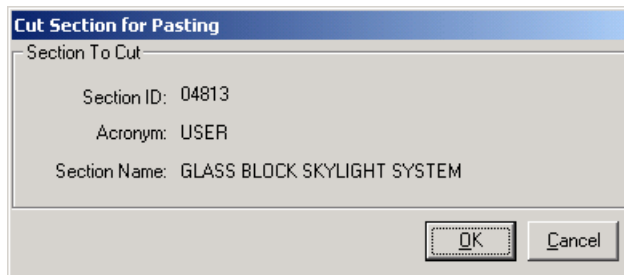
If a user-added or copied section is in the wrong folder, has a wrong Section ID, or has a wrong Acronym, fix this by cutting and pasting the section.

You cannot cut a section from the master database.

To move and/or renumber a user-added or copied section:

1. In the Tree panel, click on the title of the section you want to move and/or renumber.
2. Using your right mouse button menu click on Cut Section... or from the Document menu, point to Sections, and then click Cut Section...

The Cut Section for Pasting dialog box opens.



Cut Section for Pasting dialog box

3. Verify that this is the section you want to move and/or renumber, and then click OK (Otherwise, click Cancel).
4. In the Tree Panel, click on the folder that will contain the moved and/or renumbered section.
5. Using your right mouse button menu click on Paste Section Into... or from the Document menu, point to Sections, and then click Paste Section into...

The Paste Section Into... dialog box opens.

Paste Section into 04800 - Masonry Assemblies

Move Section From

Section ID: 04813

Acronym: USER

Section Name: GLASS BLOCK SKYLIGHT SYSTEM

Move Section To

Section ID: 04813

Acronym: USER

Section Name: GLASS BLOCK SKYLIGHT SYSTEM

OK Cancel

Paste Section Into... dialog box

6. Change the Section ID and/or the Acronym, if desired. You can also change the Section Name; however, it is not necessary to cut and paste a section in order to change the section name. When all desired changes have been made, click OK.

The section is moved to its new location in the Tree panel, and/or the ID is changed.

NOTE: It is not necessary to Cut and Paste a section in order to change the section name. To change any section name, view the section in the Document Panel, drag across the text of the current title to highlight it, and then type the new name. Click on a different paragraph to save your edit and the section name will update in the tree. If in the SpecLink tab, the name change will be effective for the current hierarchy only. If you need to change the section name for both MasterFormat 95 and MasterFormat 04, the change needs to be done in each hierarchy.

Deleting a Section

If you added or copied a section in error, or if the added or copied section will never be needed again, delete it. You can delete user-added or copied sections. You cannot delete a section from the master database.

It is not necessary to delete a section in order to omit it from your project specification. Rather than deleting, deselect the section by clicking in the status box to return it to a neutral state. For more information, see the section on Status Boxes in Chapter 3.

To delete a user-added or copied section:

1. In the Tree panel, click on the section you want to delete.

2. Using your right mouse button menu click on Delete Selected Section or from the Document menu, point to Sections, and then click Delete Selected Section.
3. You will be asked to verify the deletion. When you click OK, the selected section is deleted. Note that if you are in the SpecLink tab, deleting the section in one MF hierarchy deletes the section in both hierarchies.

NOTE: Be certain you want to delete the section before clicking OK, because it is not possible to UNDO this process.

Importing Sections Into a Project

If you copy an entire project, as described in the previous section of this chapter, it may be necessary to deselect certain sections or edit them heavily. Import from Project allows you to select for copying the specific sections you need. You can import sections from multiple projects, combining them as appropriate for your new project.

Importing sections gives you a "jump start" on a new project because you can reuse your previous work. Keep in mind that you did not modify the Master, so don't worry about losing any of that information.

Importing BSD master sections causes the same selections and edits to be made to those sections in the new project as in the old project. Importing user-added sections creates the section and the text in the new project.

NOTE: User-added sections will not automatically import to the correct folder. If you will be importing sections that you created, click on the folder you would like those sections to import to prior to starting the import process.

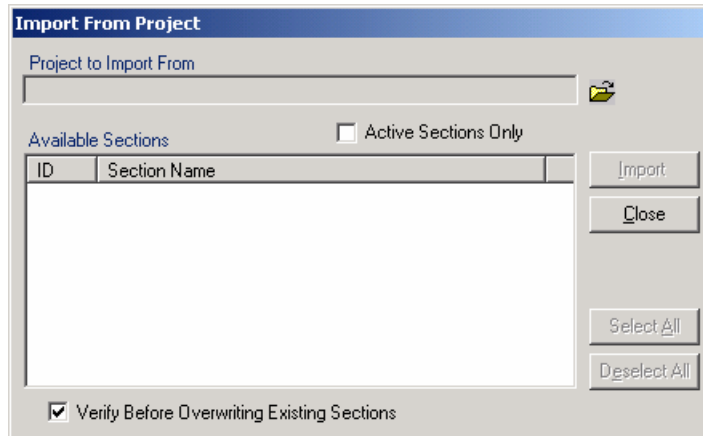
To copy sections from one project to another using Import From Project:

1. Open the project that you are going to import from to make sure that it has been opened in the current version of the software. Once the project that you are going to import from has been opened in the current version, you can close it.
2. Open the project to receive the imported sections.
3. In the Tree panel click on any folder. Or, if you will be importing any user-added sections, click on the folder that should contain the user-added sections.

NOTE: If you will be importing multiple user-added sections that belong in different folders, you can create a temporary folder using the directions for adding folders earlier in this chapter, and then import the user added sections to that folder. Once they have imported, use Cut Section and Paste Section to move the sections to the folders where they belong.

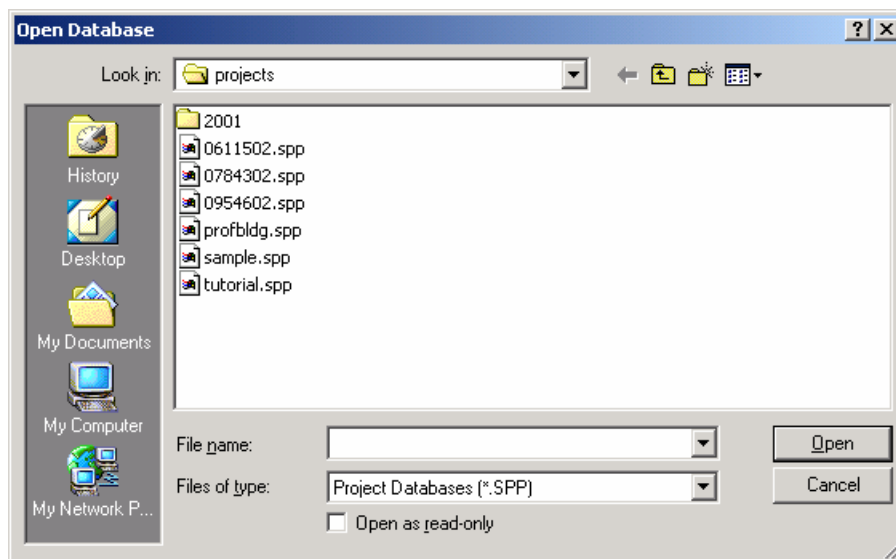
4. From the Tools menu, choose Import from Project. Or click the *Import Sections from External Project* button on the toolbar .

The Import from Project dialog box opens.



Import From Project dialog box

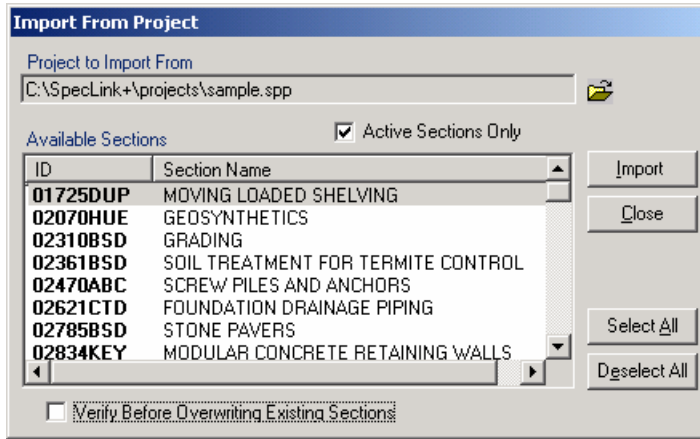
5. Click on the folder icon at the end of the *Project to Import From* field.
The Open dialog box opens.



Open dialog box

6. Move to the location of the project file you want to import sections from, click on it, and then click Open.

The selected project appears in the Import from Project dialog box, with all sections in the project listed in the lower window.



Import from Project dialog box with project selected

7. Active sections are listed in bold type. To see active sections only, select the checkbox Active Sections Only.

NOTE: You may also want to deselect Verify Before Overwriting Existing Sections since this will ask you to confirm importing each master section.

8. Click on the section you want to import, or hold the Ctrl button down to click on multiple sections. Alternatively, you can click on the Select All button.
9. When you have finished with your selections, click the Import button. The selected sections are copied into the project you have open.