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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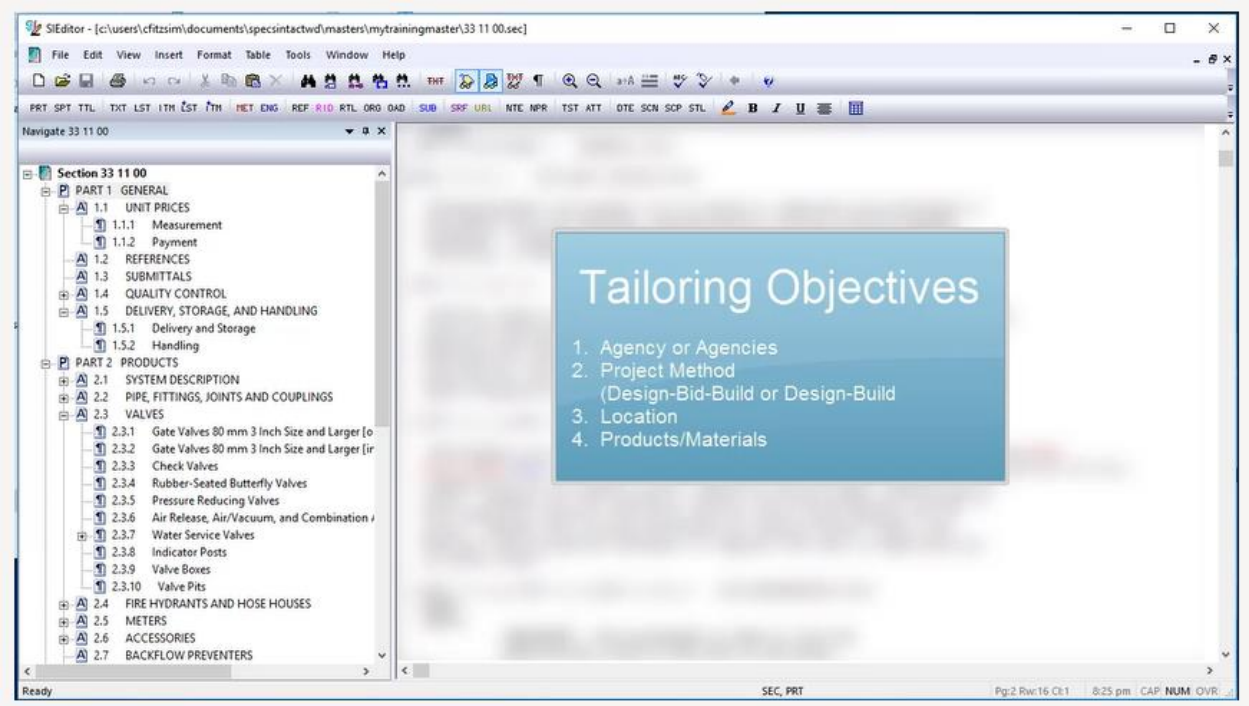
In this module we are going to focus on the requirements for inserting and managing Tailoring Options within a Unified Facilities Guide Specification (UFGS) Master. Tailoring Options are designed to make project specification editing easier. We Tailor specifications to allow the selection of an Agency 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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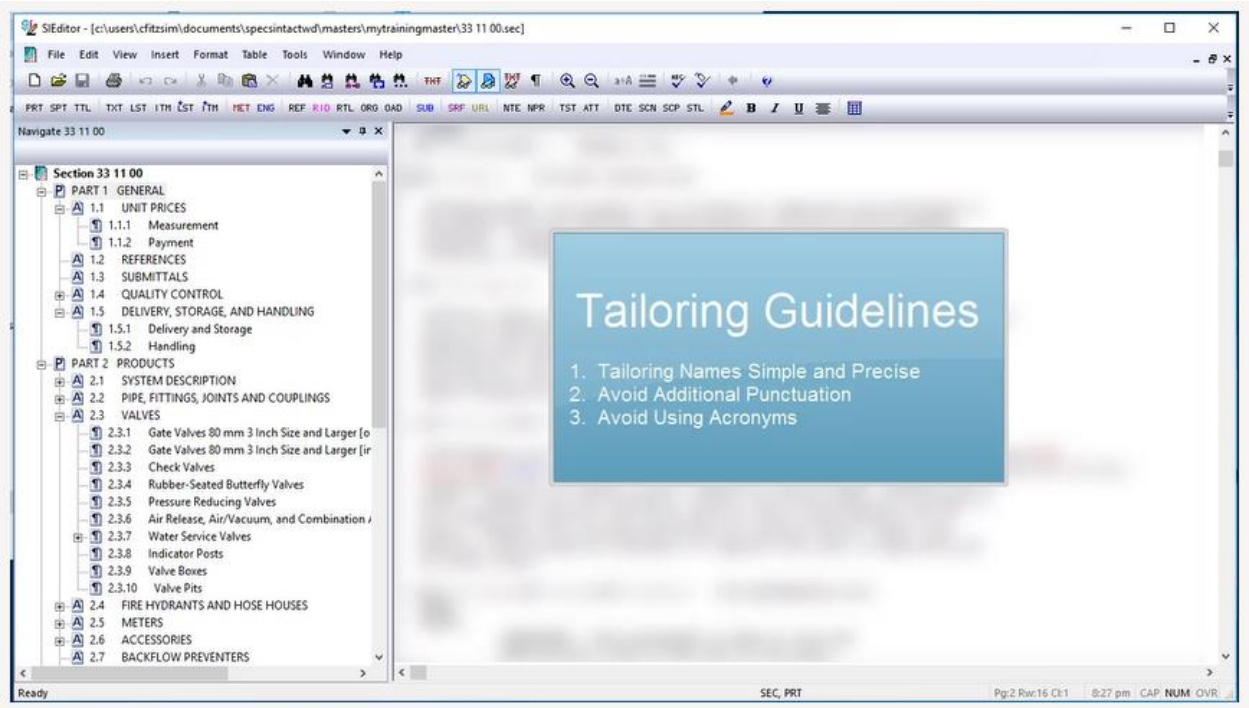
Before we begin our lesson, I would like to review some guidelines you should follow when adding new Tailoring Options. First, keep the Tailoring Option names simple and do not make them too long, as they should only be one to three words. Secondly, avoid using additional punctuation marks such as commas 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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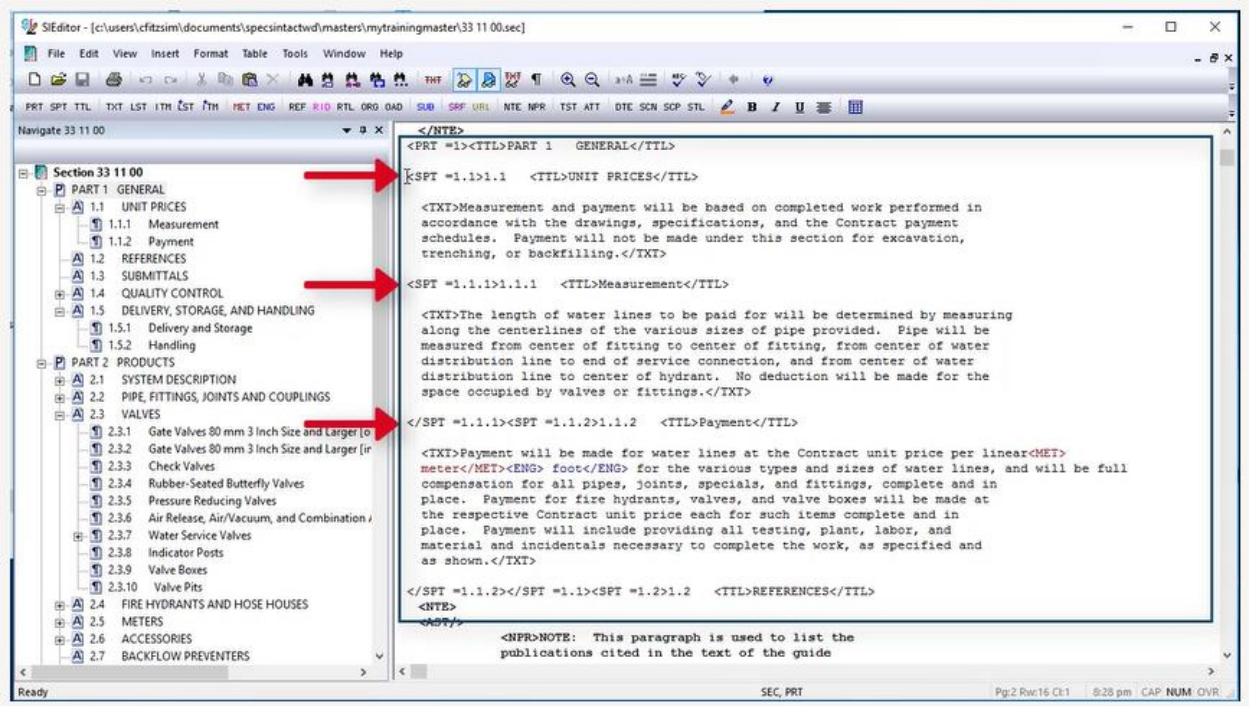
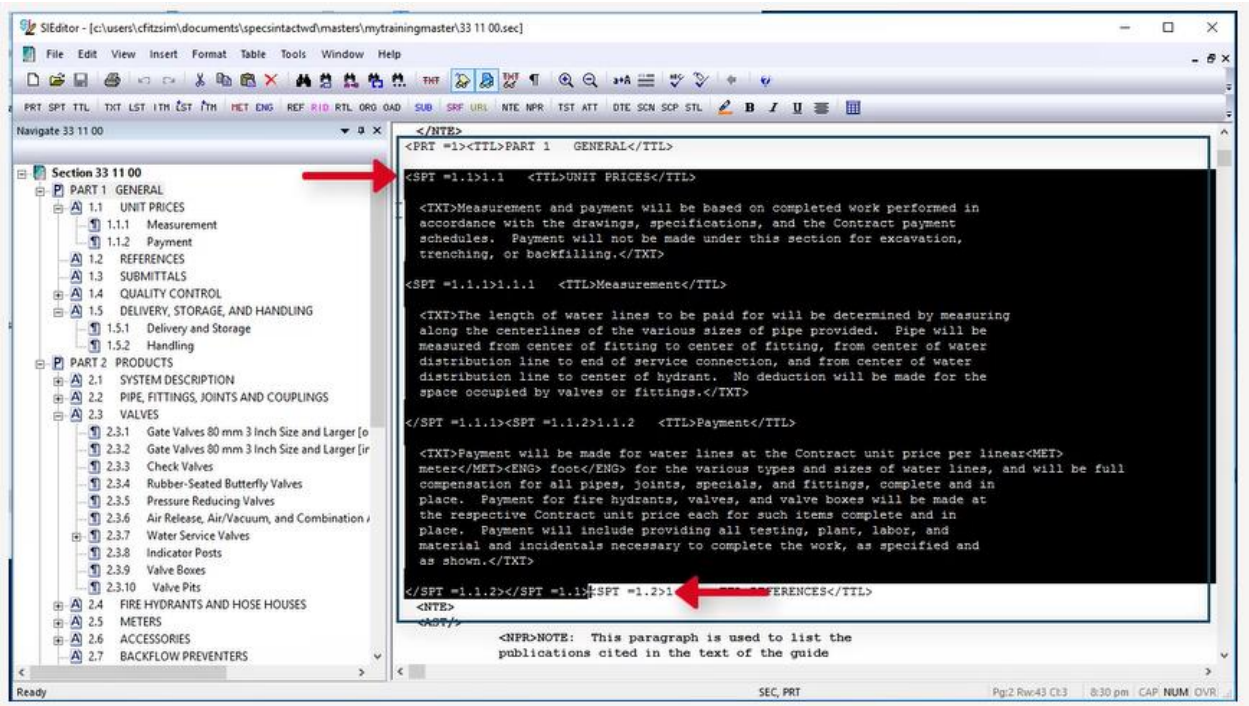
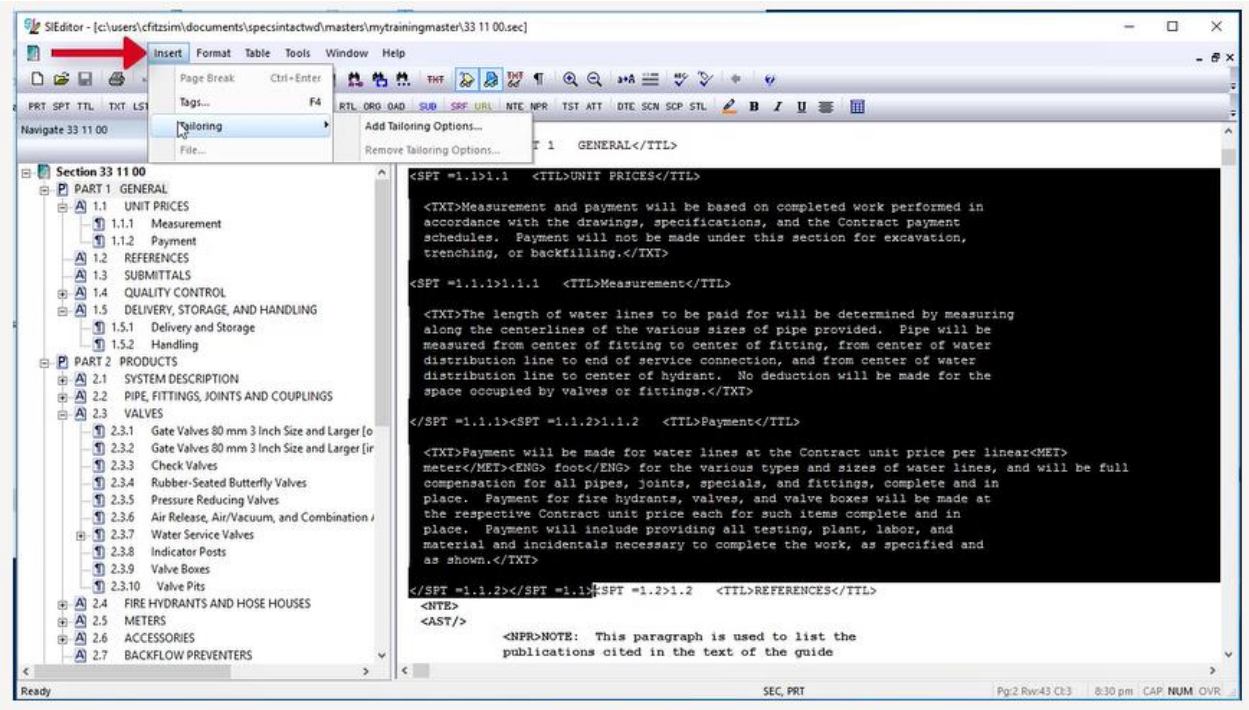
Let's start adding Tailoring Options! When adding Tailoring Options, you will always start by selecting the item to tailor first. We are going to begin by adding a Tailoring Option for Air Force, Army, and NASA around 1.1, 1.1.1, and 1.1.2.



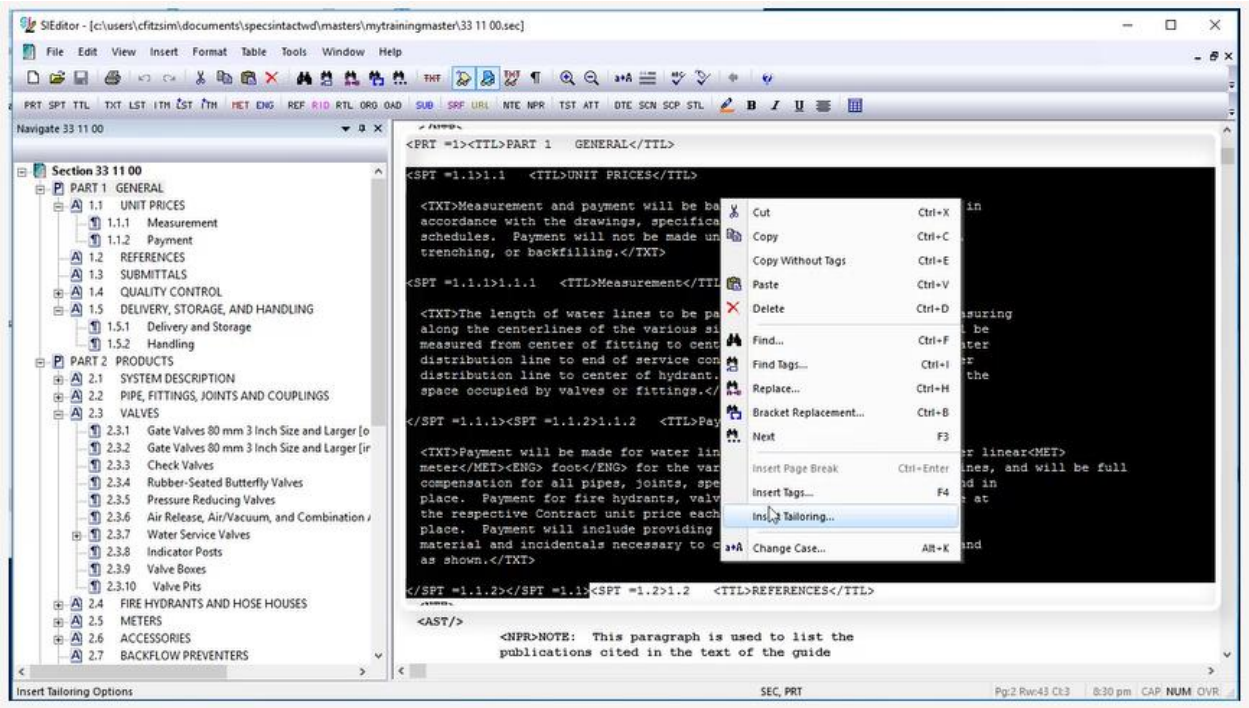
Let's go ahead and highlight the three subparts. As you see, I started highlighting before the beginning <SPT =1.1> tag, and stopped highlighting after the ending </SPT =1.1> tag.



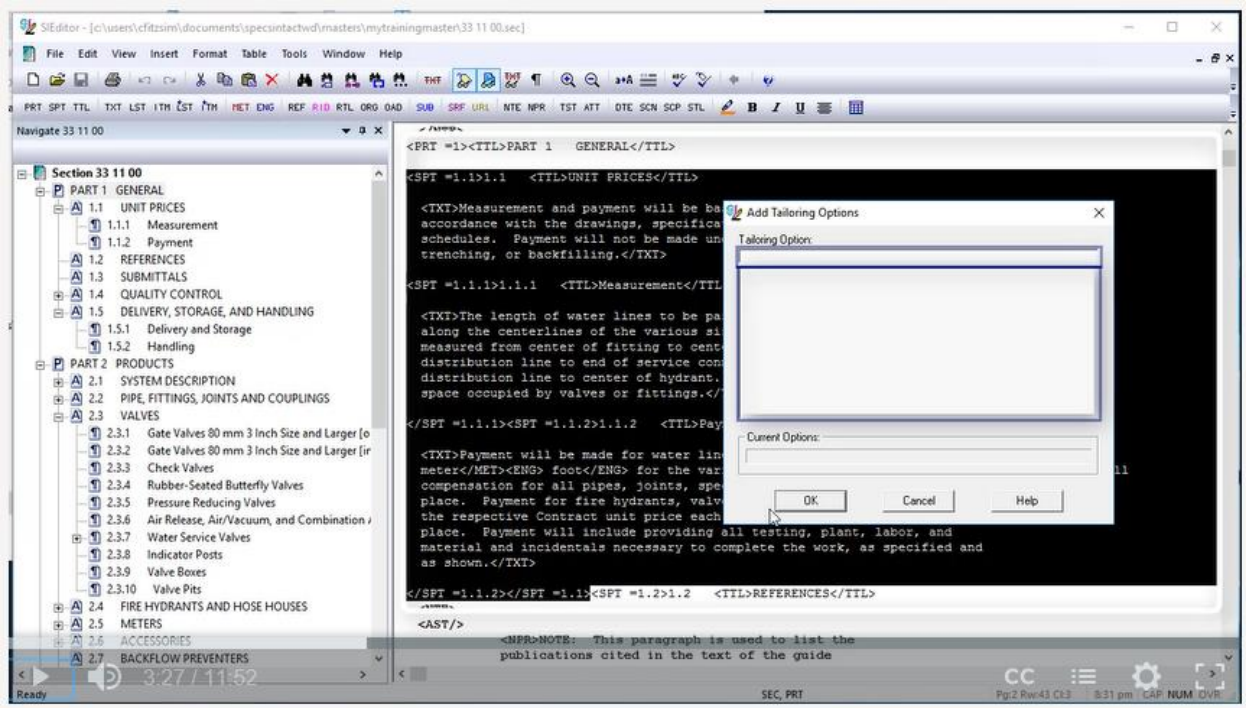
To Insert a Tailoring Option, we can either select the Insert Menu and select Tailoring, Add Tailoring Option



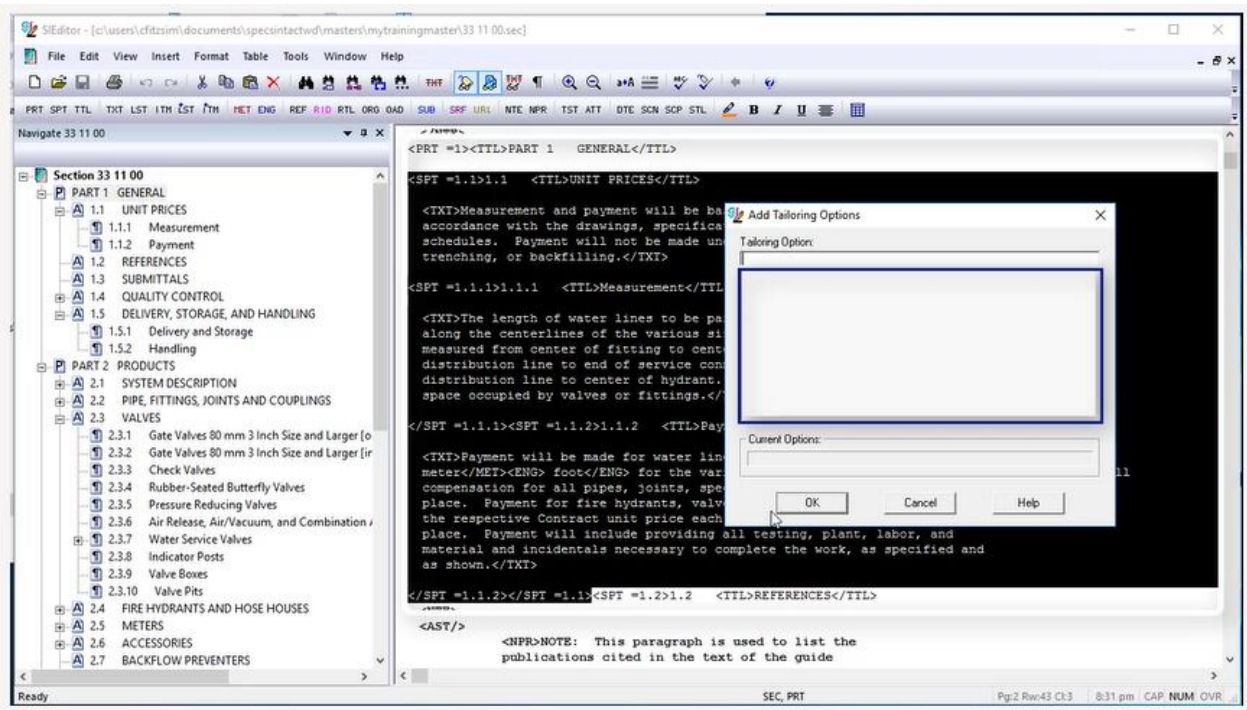
or we can mouse-over the highlighted area, right-click and select Insert Tailoring.



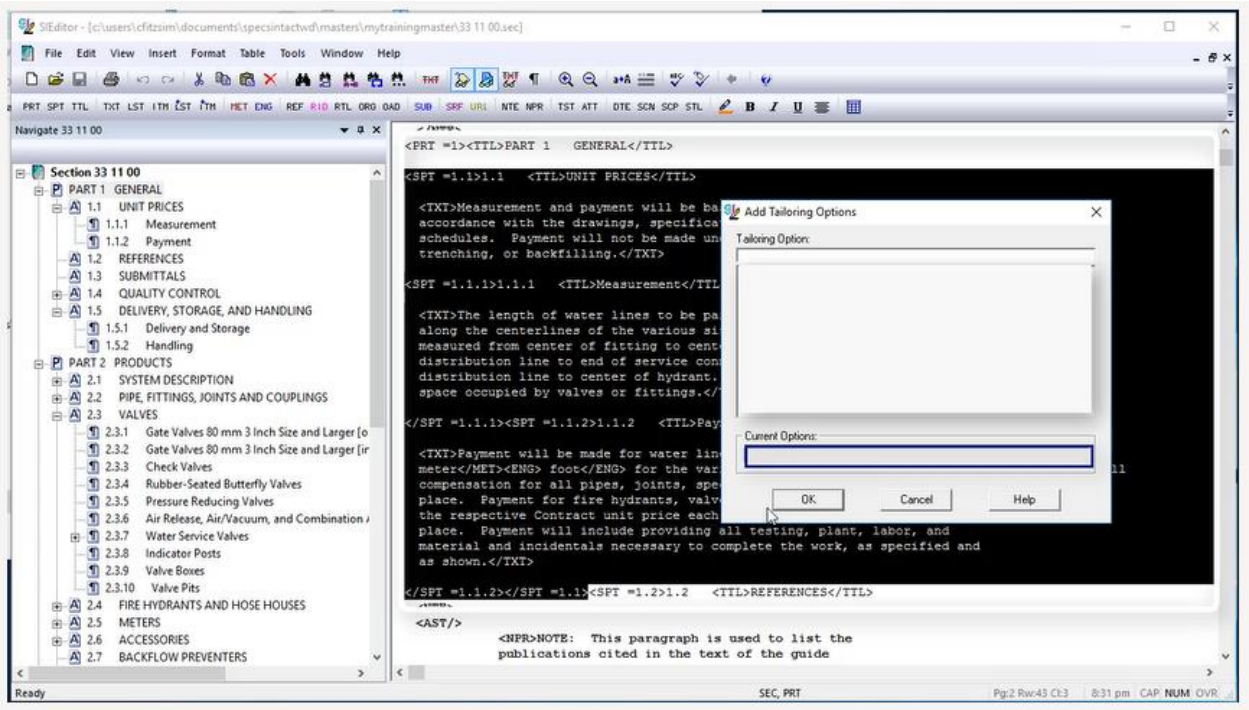
Before we start adding the Tailoring Options, let's discuss the Tailoring Options window. The field below Tailoring Option is where you will enter the new Tailoring Option.



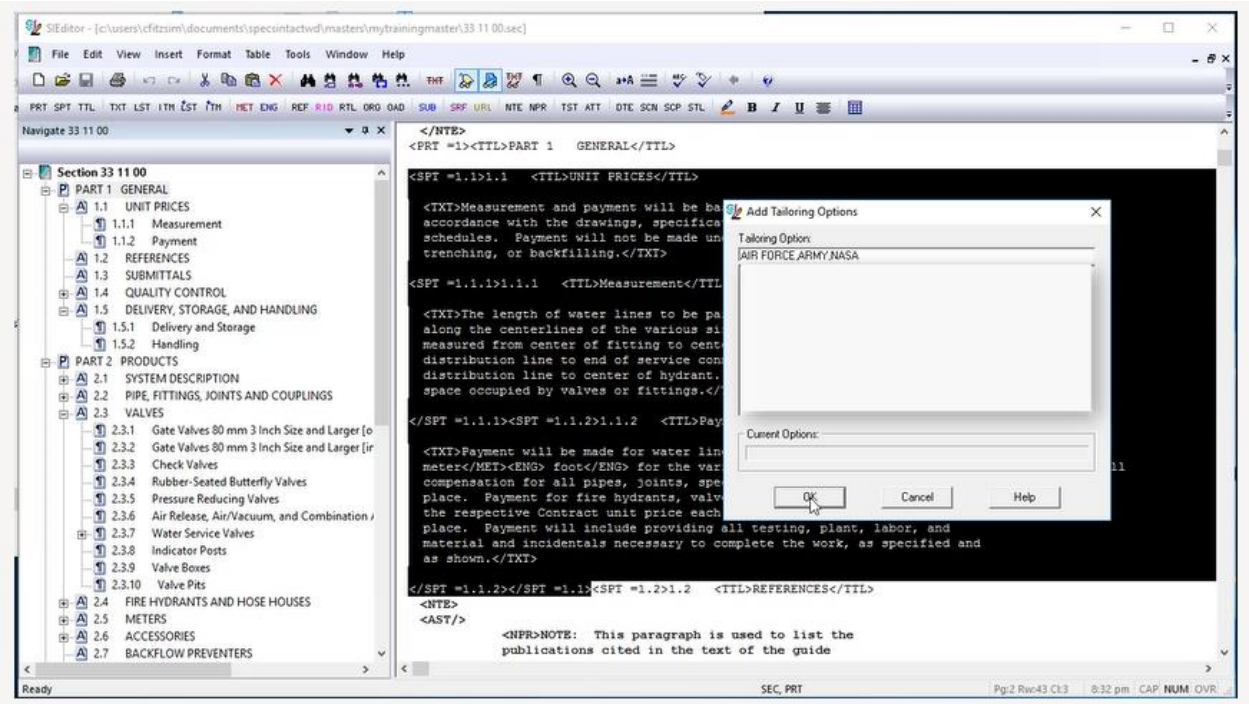
The area directly below is where the existing Tailoring Options within the Section will be listed.



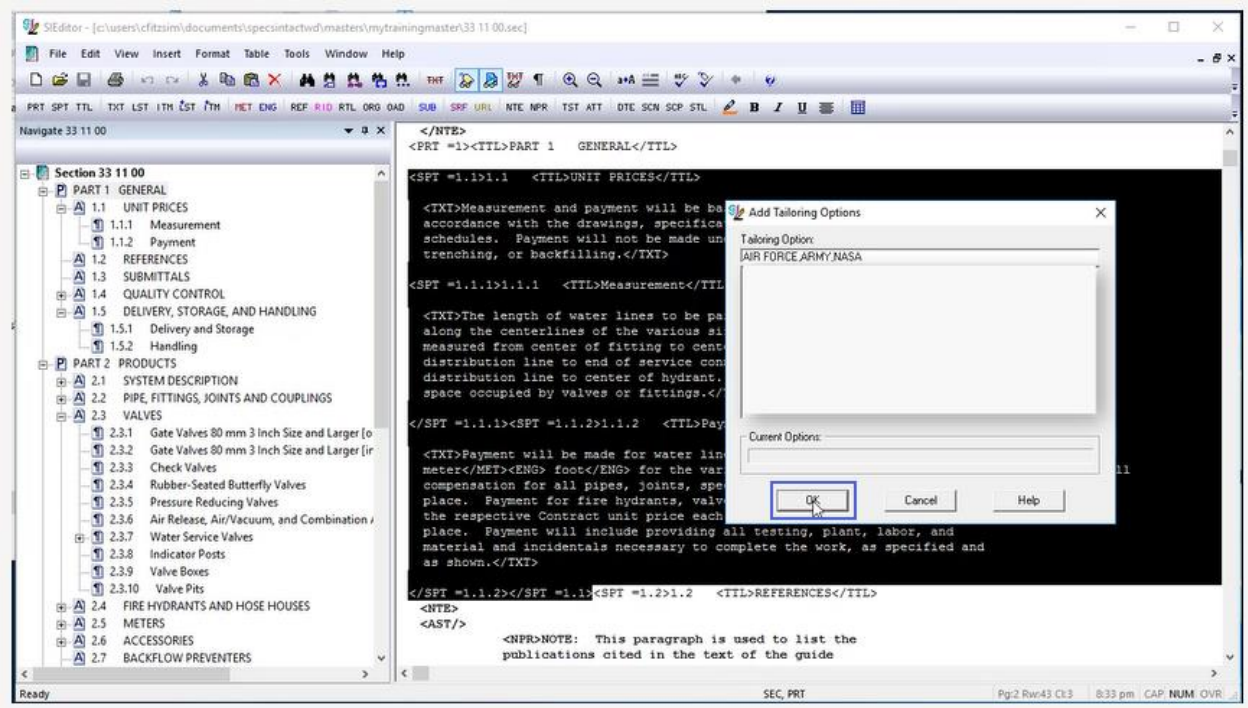
The field below Current Options will display the details of an active Tailoring Option.



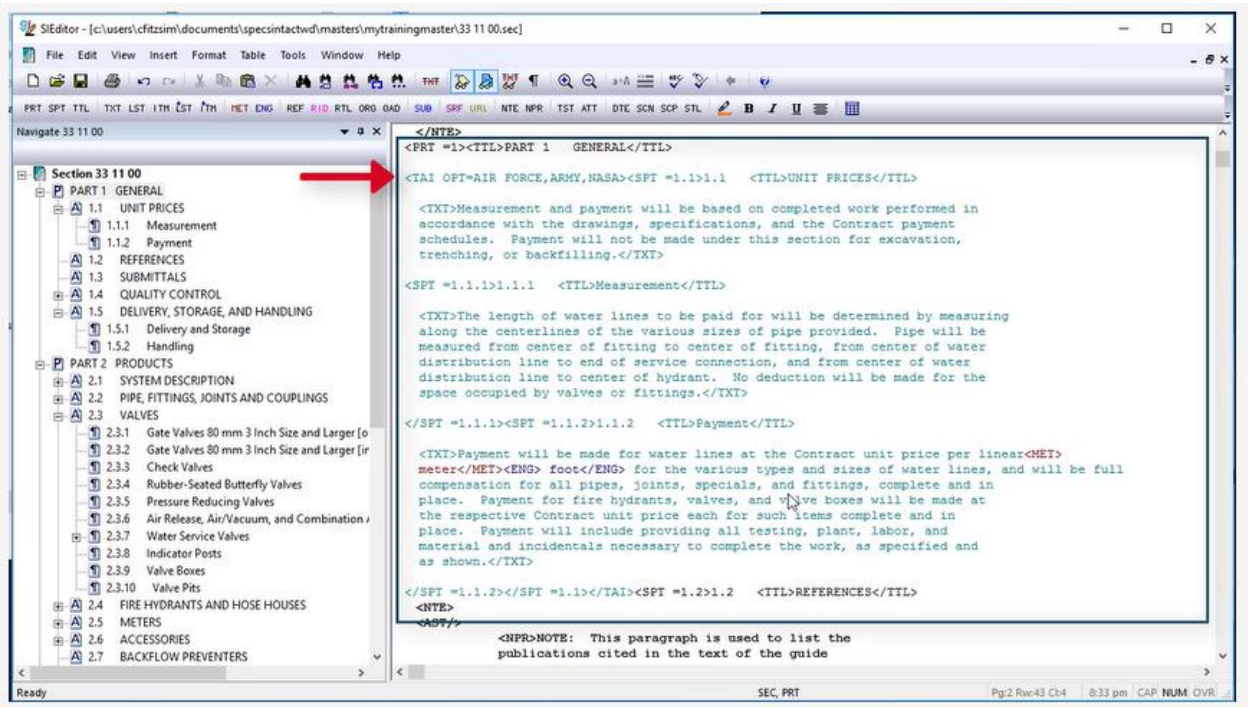
In order to see this information, your cursor must be positioned within a current Tailoring Option in order to add or remove Tailoring Options. Now that you understand the functions of the Tailoring Window, let's *place our cursor* **below Tailoring Option** and enter "AIR FORCE,ARMY,NASA."



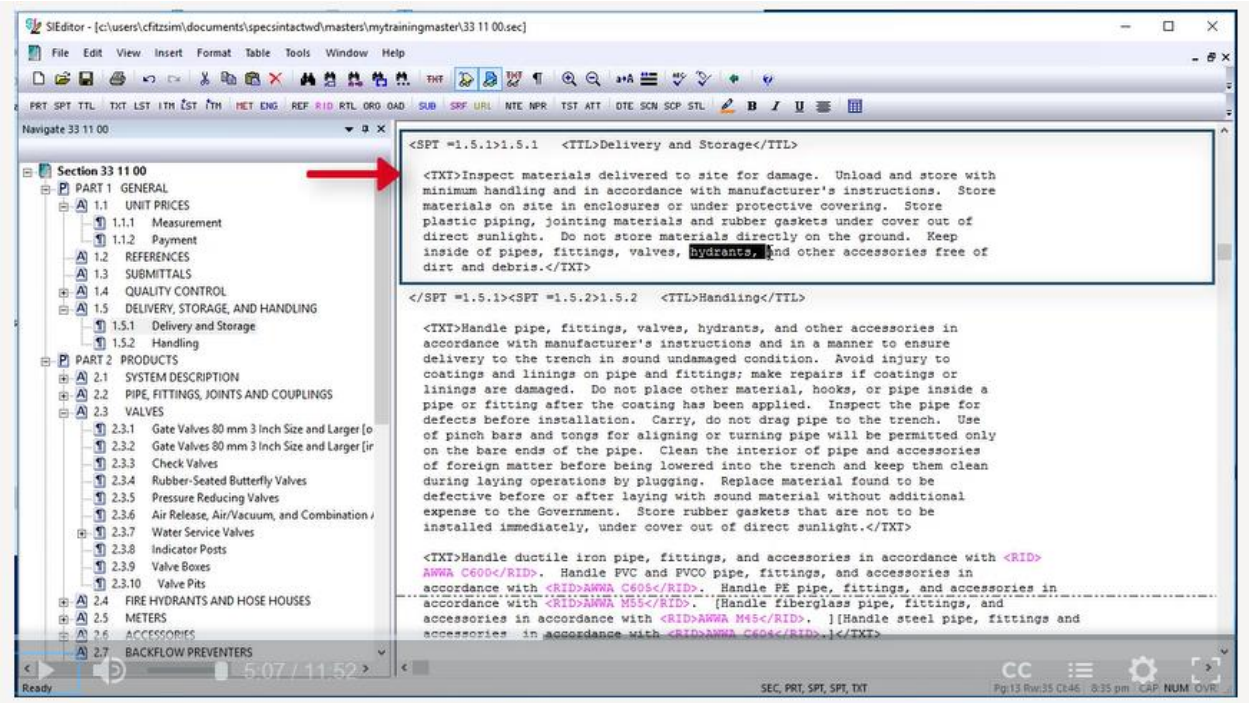
Previously, I mentioned that commas are used to define multiple Tailoring Options, so as I was entering the new Tailoring Options, I separated each one with a comma and no spaces. Now that we have the Tailoring Options entered, let's *select* **OK**.



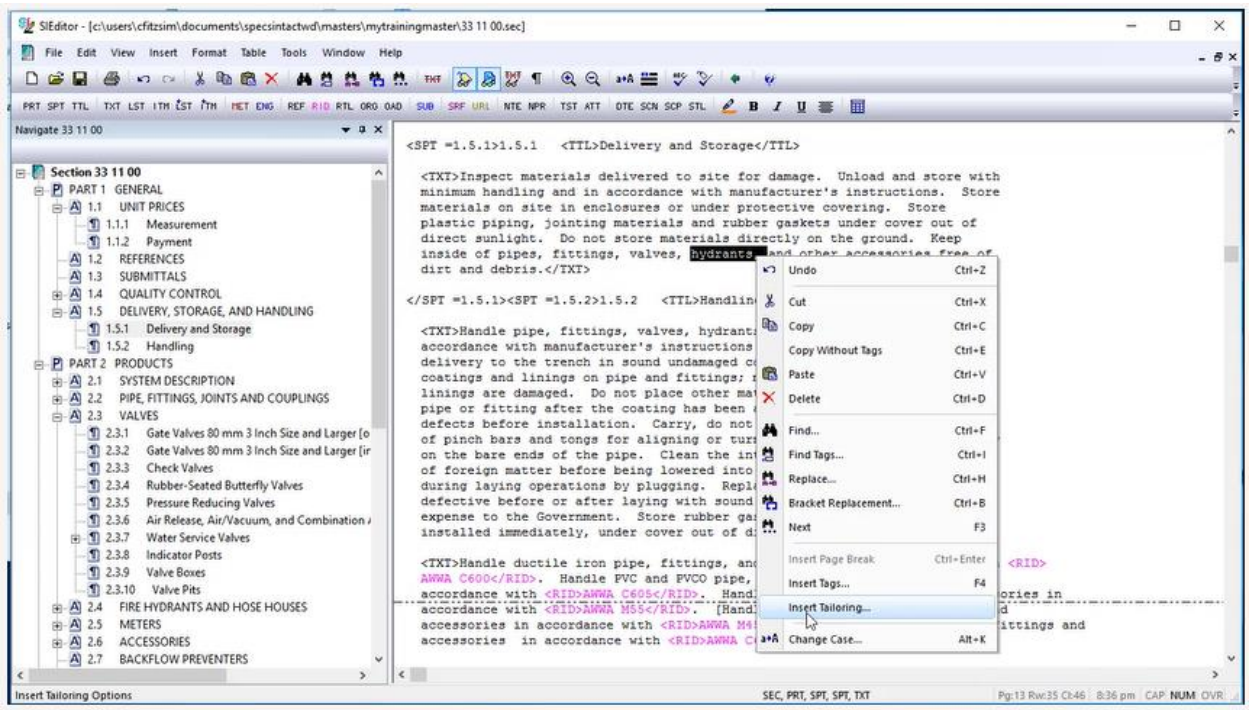
The font color of a Tailoring Option is teal, which distinguishes it from other elements within the Section. In some cases, Tailoring Options can often encompass large amounts of text, so you're not always sure what Tailoring Option you may be reviewing or editing, you can simply mouse-over the text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



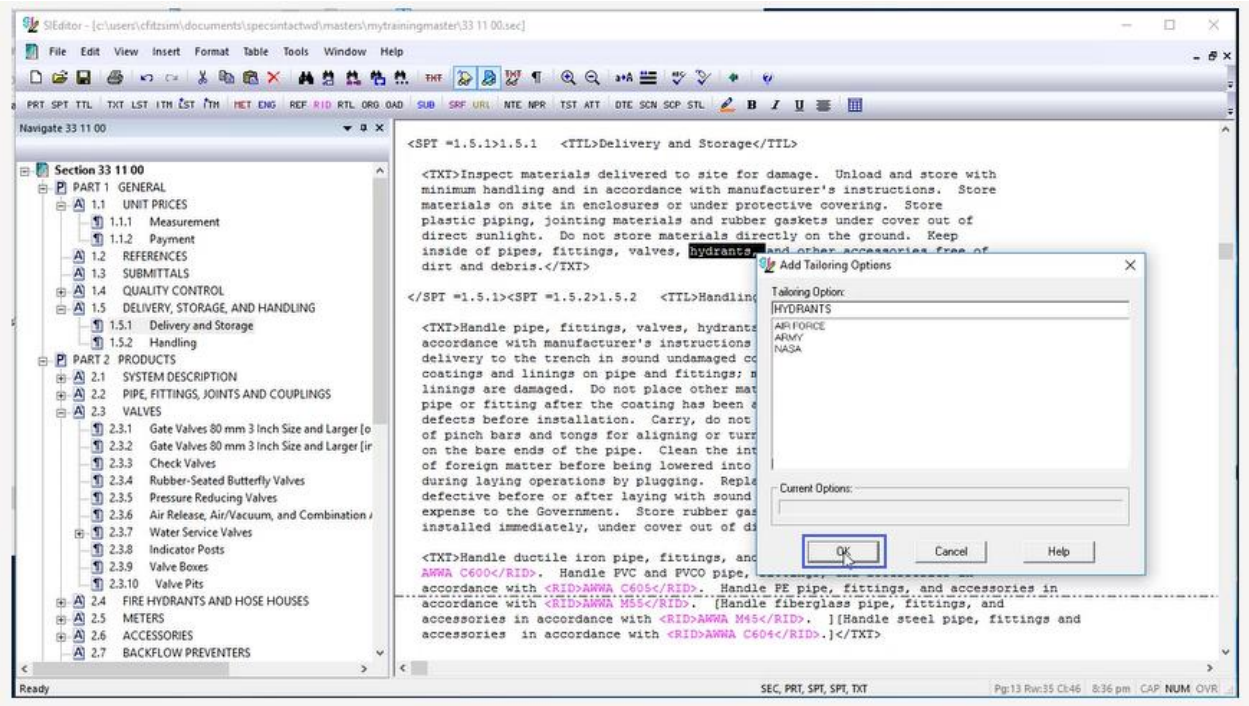
Let's navigate to Subpart 1.5.1. Within the paragraph, I would like to add a Tailoring Option for Hydrants. In the last sentence of the paragraph, I am going to *place my cursor before* "**and**", and *type* "**hydrants,** ". Now I'm going to *highlight* "**hydrants**" and the following comma and space. 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.



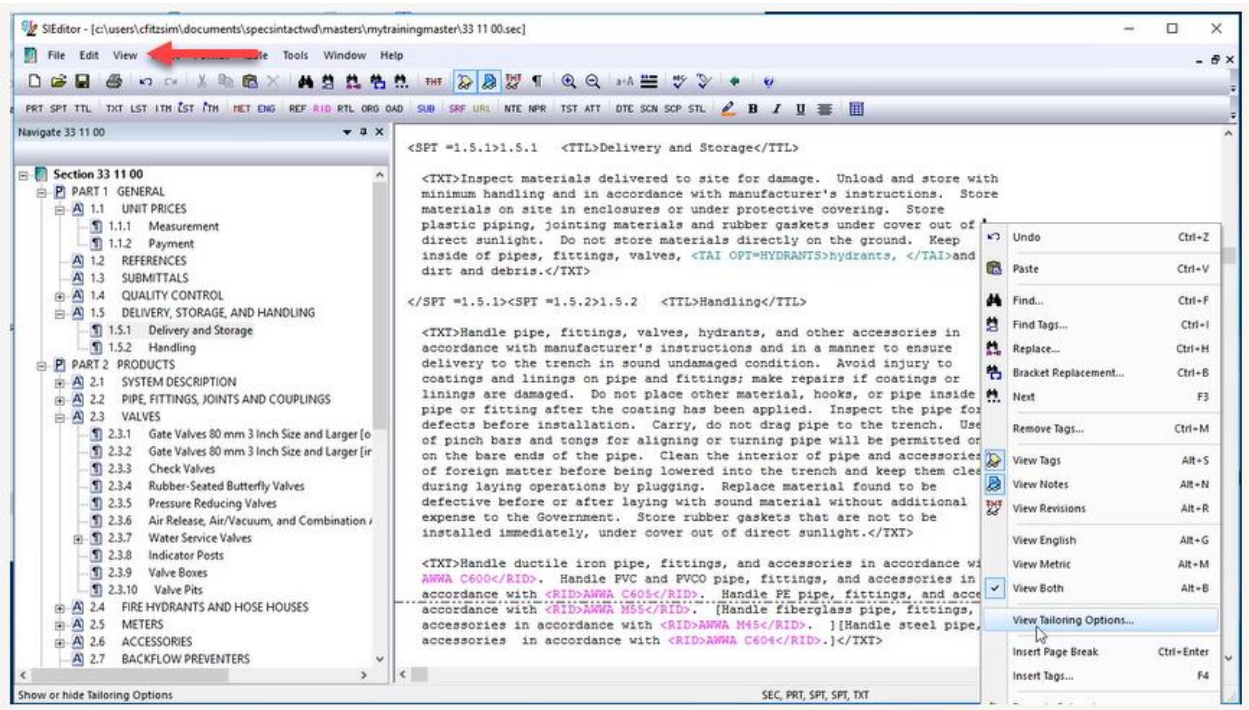
Now let's *right-click* and select **Insert Tailoring**,



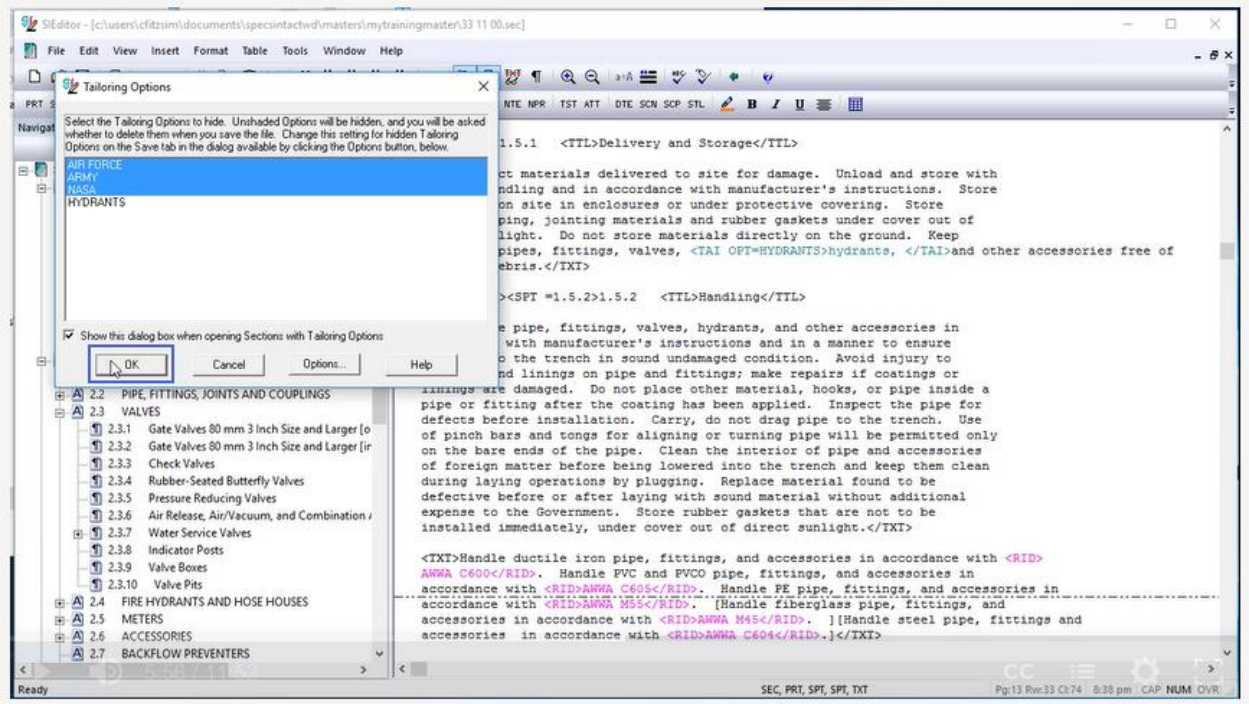
enter "**hydrants**" and *select* **OK**.



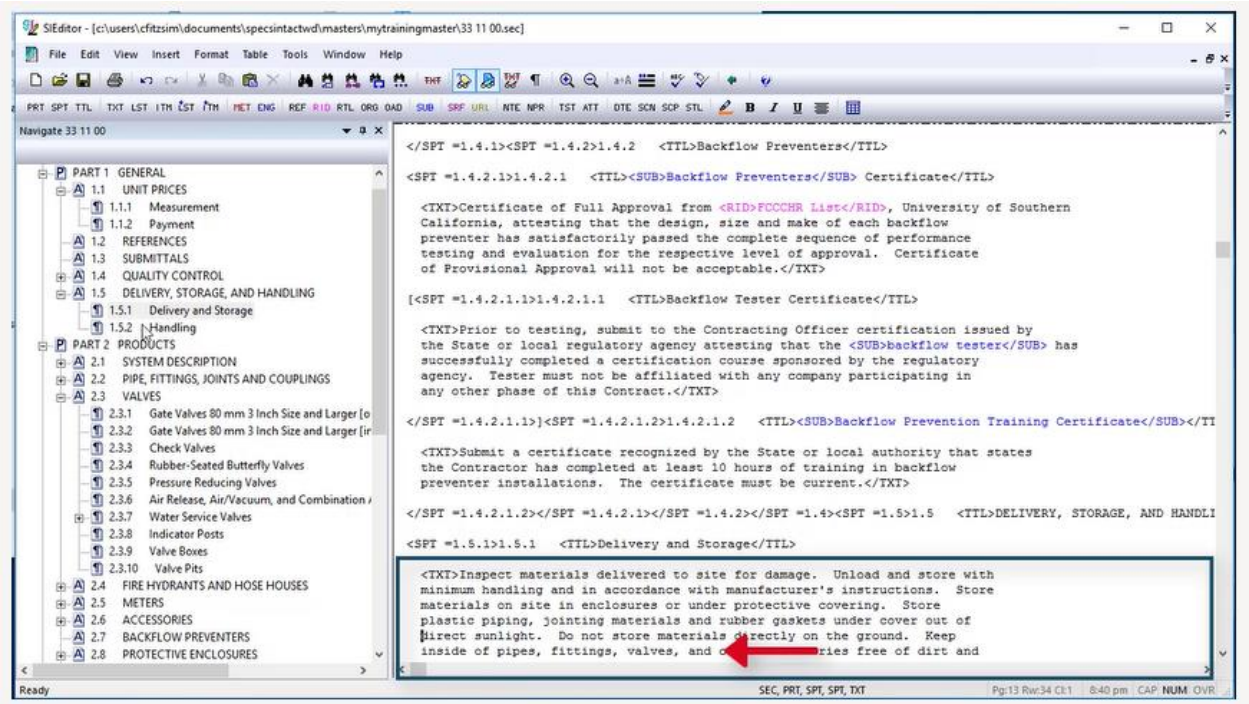
When you need to add multiple Tailoring Options within a paragraph pay close attention to the punctuation and spacing and always test your work to ensure proper alignment! To do this, go to the View Menu and select Tailoring, or right-click an area of the Section that does not contain Tailoring Tags,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



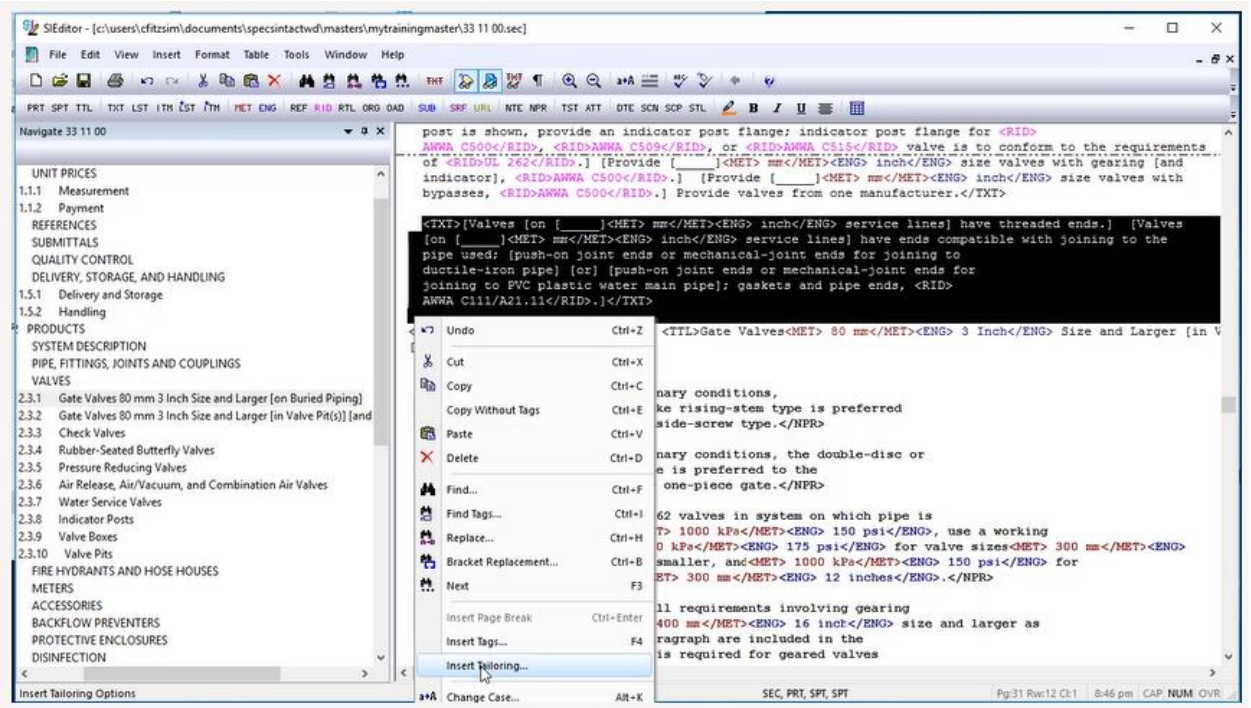
From the Tailoring Options window, you will *click* on the **Tailoring Option** you want to temporarily hide, so let's *click* on "**HYDRANTS**", and *select* **OK**.



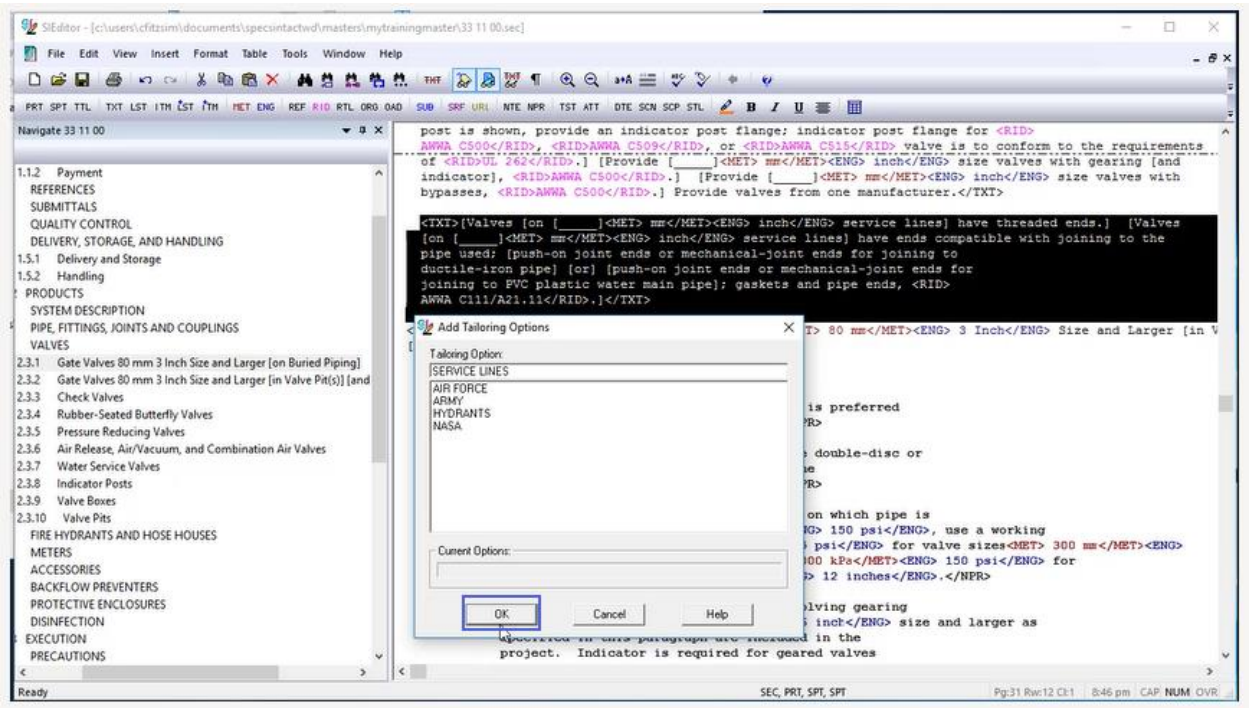
As we examine the paragraph, we no longer see hydrants as the option was hidden and is no longer apart of the sentence and the punctuation and spacing is correct. Always make sure to unhide them as you complete your testing!



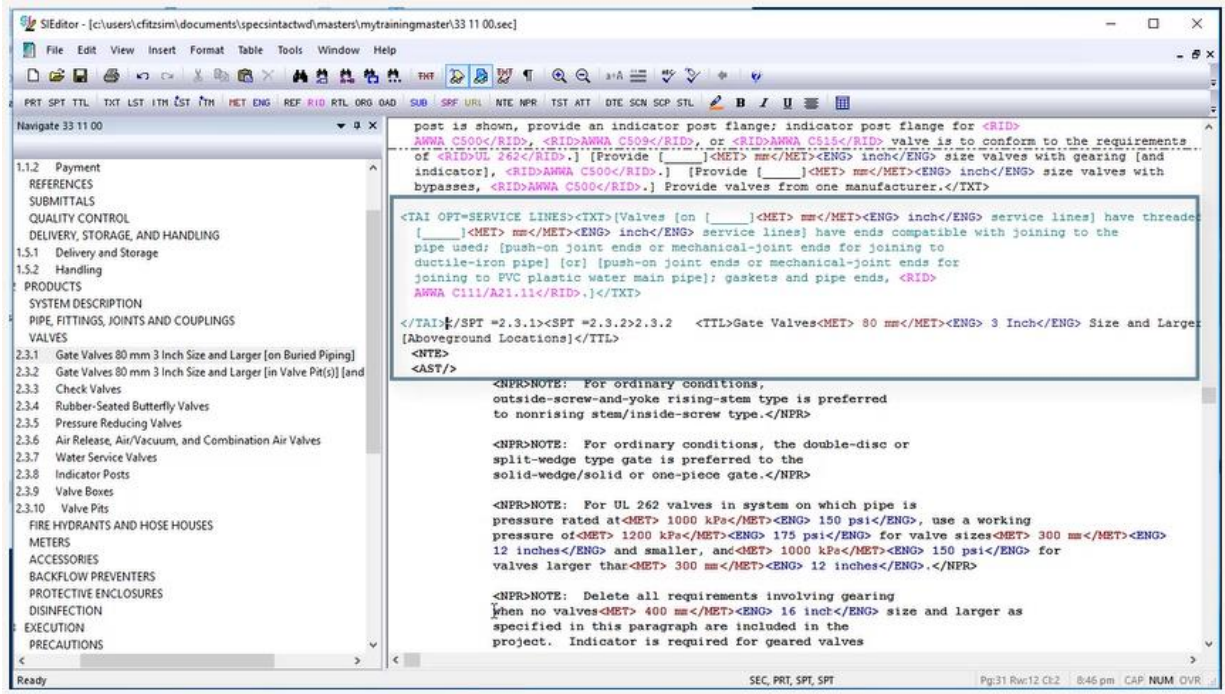
Now I would like to show you the correct way to add Tailoring Options around the last paragraph of a Subpart so the Tailoring Tag encompasses the blank line. Let's Navigate to Subpart 2.3.2 and scroll up so we can see the last paragraph. *Now place your cursor before* the beginning **<TXT> Tag** to highlight,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



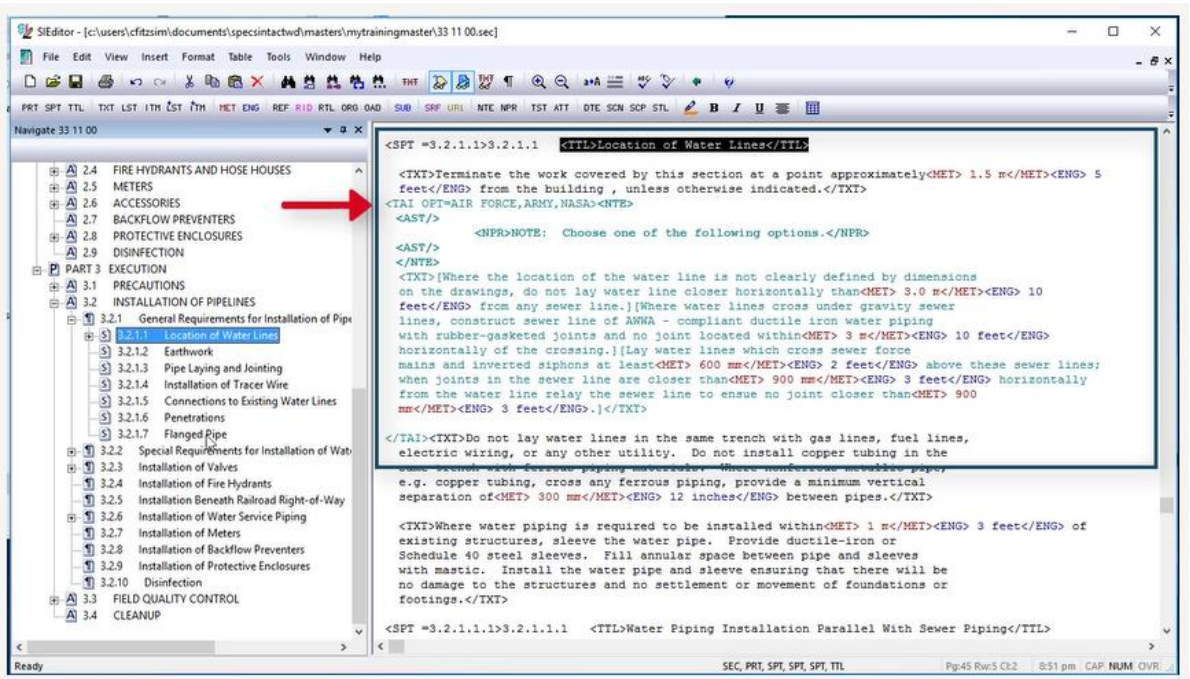
Below the Tailoring Option, let's enter Service Lines, and *select* **OK** or *press* **Enter**.



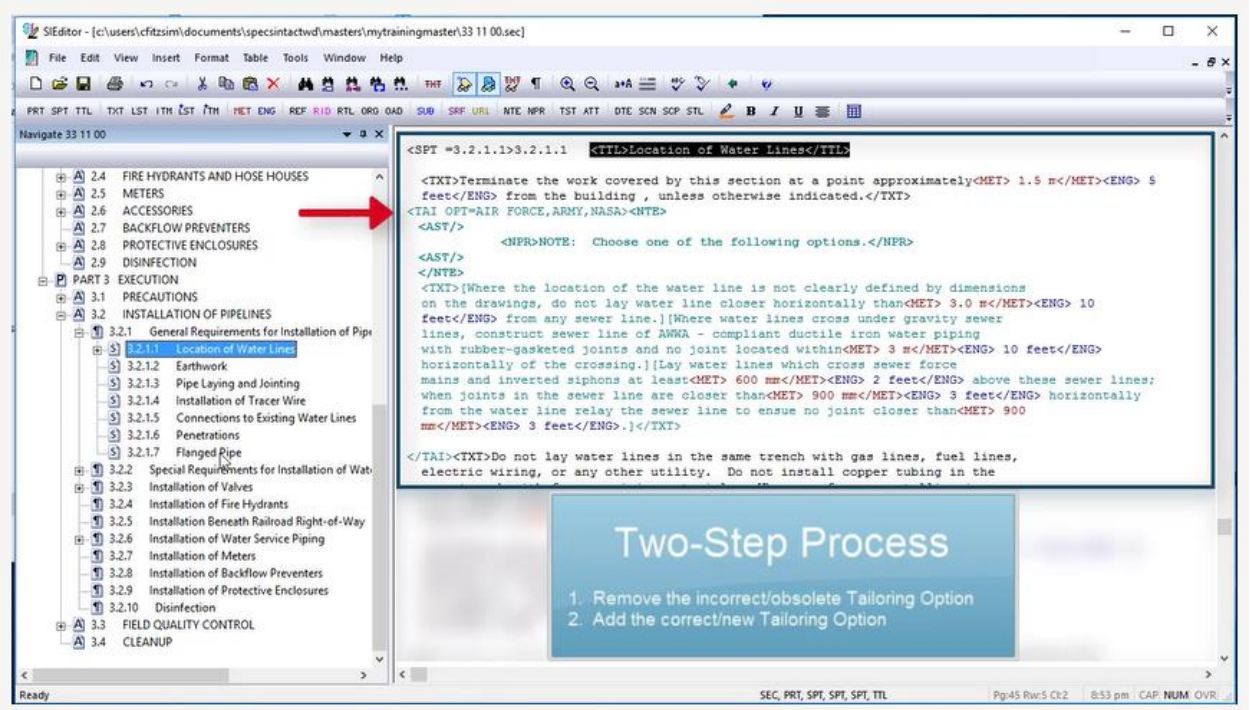
Making sure you include the proper spacing within the Tailoring tag prevents unnecessary cleanup once the Tailoring Options are removed. In some cases, you may find that you need to modify an existing Tailoring Option to either remove one of the options, add an option, or redefine an existing option. 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



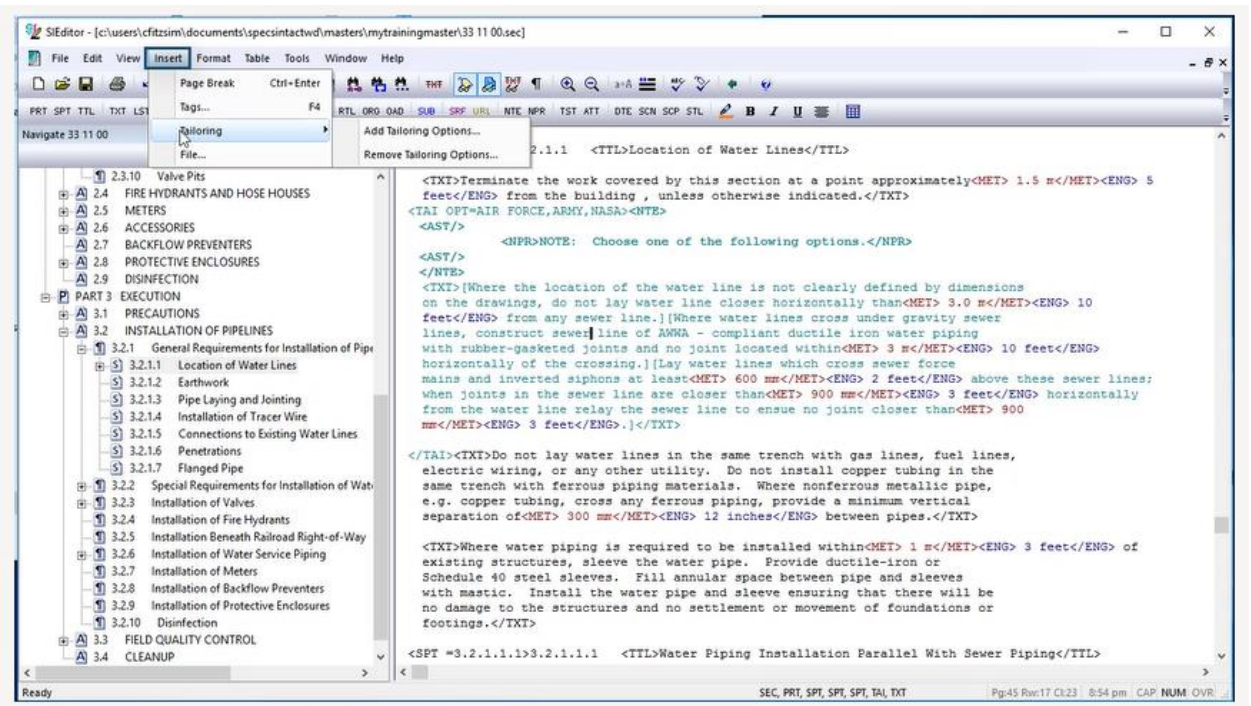
Before we begin, I wanted to bring your attention to the placement of the Tailoring Tag. Normally, the tag would be placed in front of the <TXT> Tag, but in this case, there is a Technical Note that needed to accompany the text paragraph so in this case, the Tailoring Tag began before the beginning Note 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.



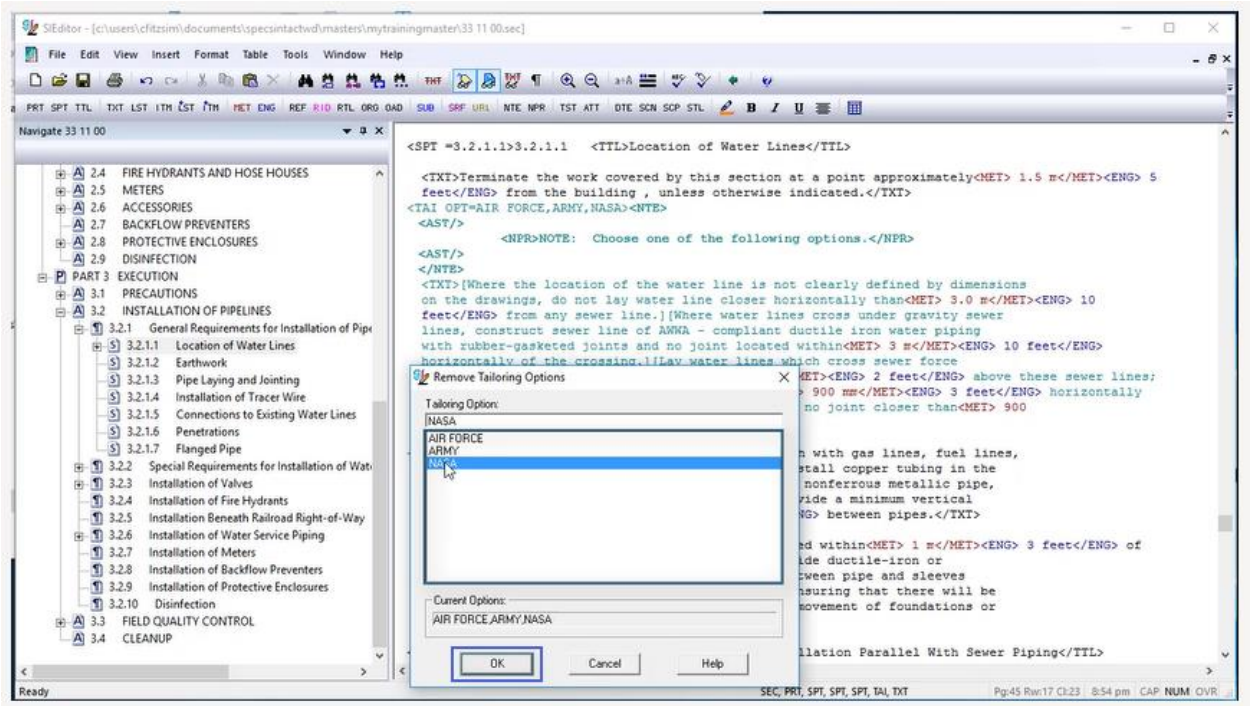
Let's go ahead and modify this Tailoring Option. As you see we currently have a Tailoring Tag for Air Force, Army, and NASA but we need to change NASA to NAVY. This is a two-step process in order to remove one option and add the other option.



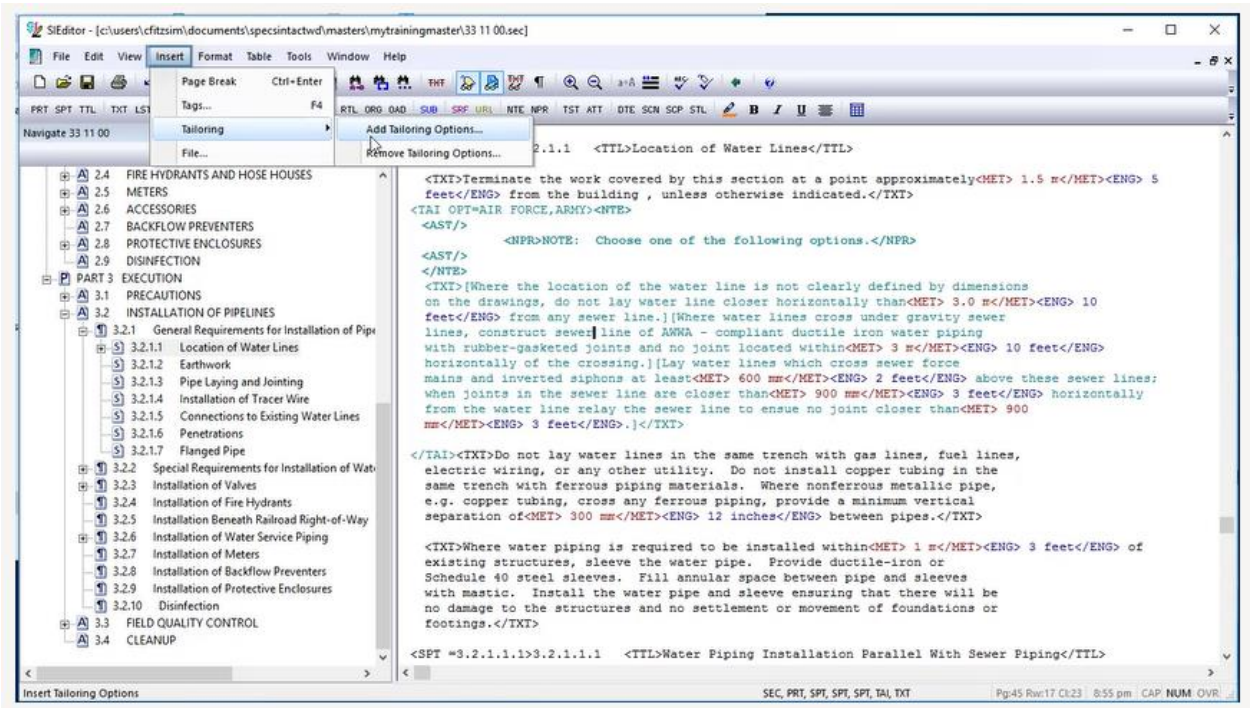
In order to do this, *place the cursor* within the **Tailoring Option**, go to the Insert Menu and *select* **Tailoring**, then **Remove Tailoring Options**. When the Remove Tailoring Options window opens, the Tailoring Options will be displayed below Current Option. Before making changes, always verify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



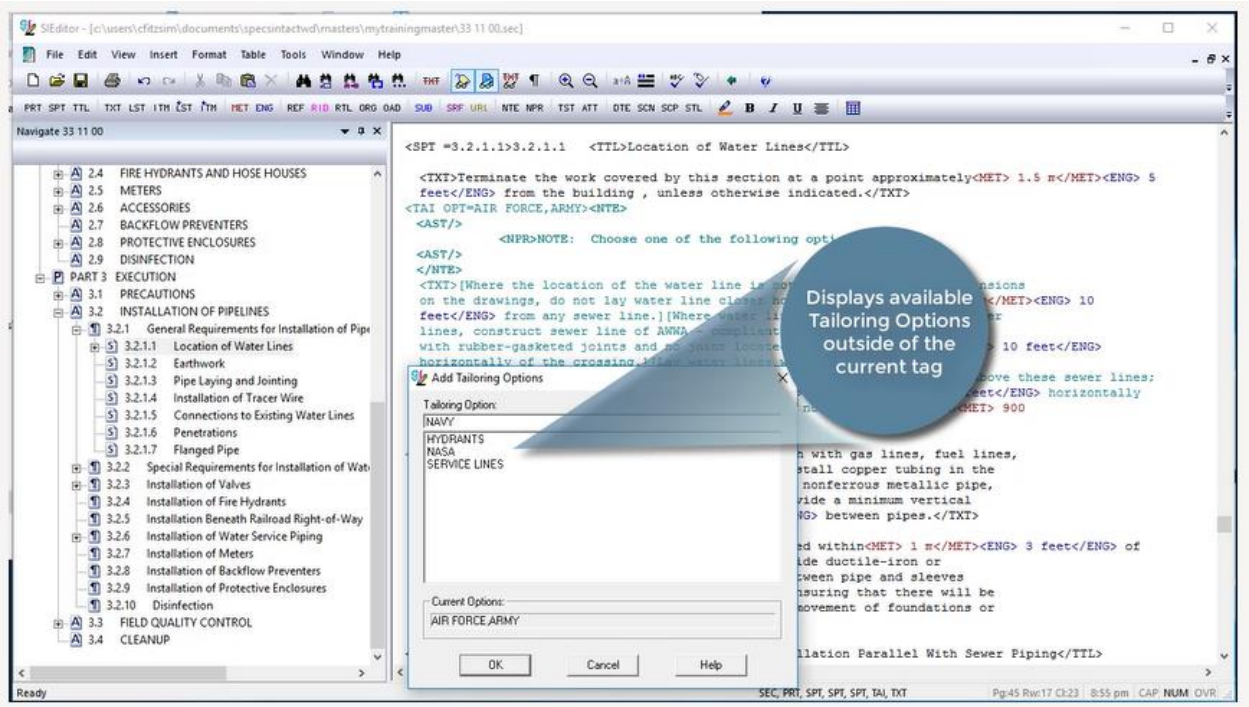
Let's go ahead and *select* **NASA** and then *select* **OK**.



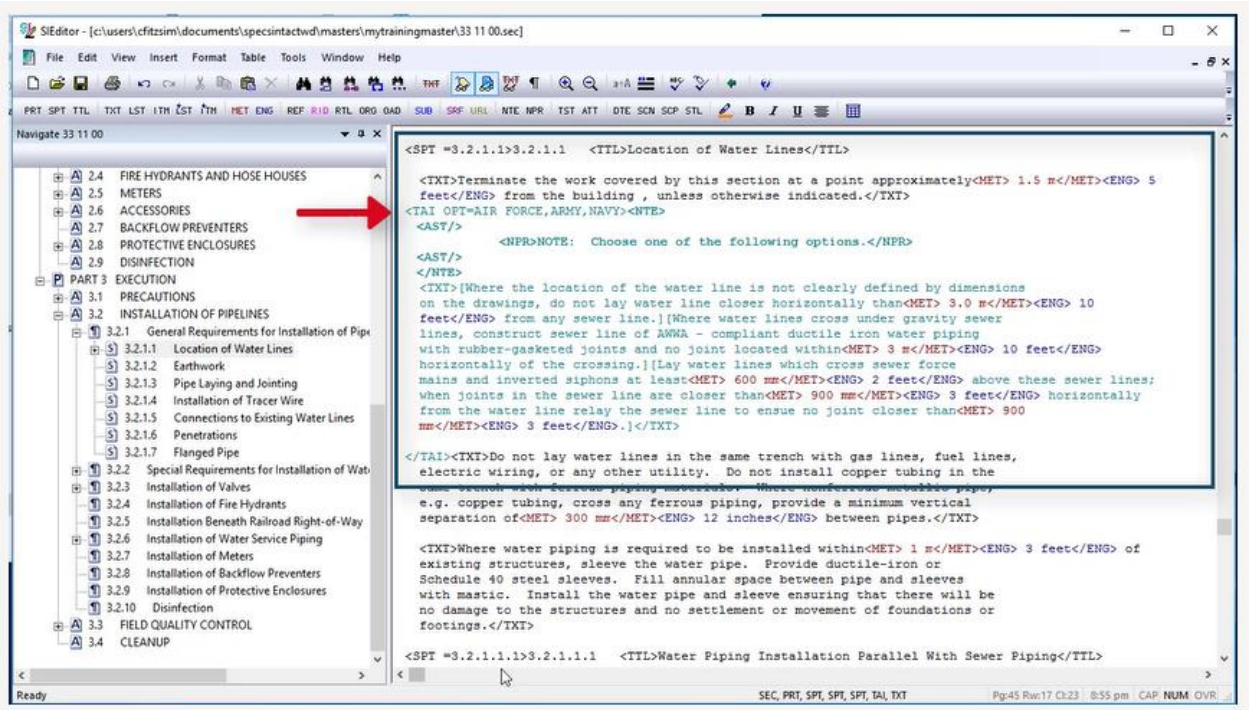
As we examine the Tailoring Tag, you will see that it now only reflects Air Force and Army. Now we are going to add NAVY, so *let's go back to* the **Insert Menu**, *select* **Tailoring**, **Add Tailoring Options**.



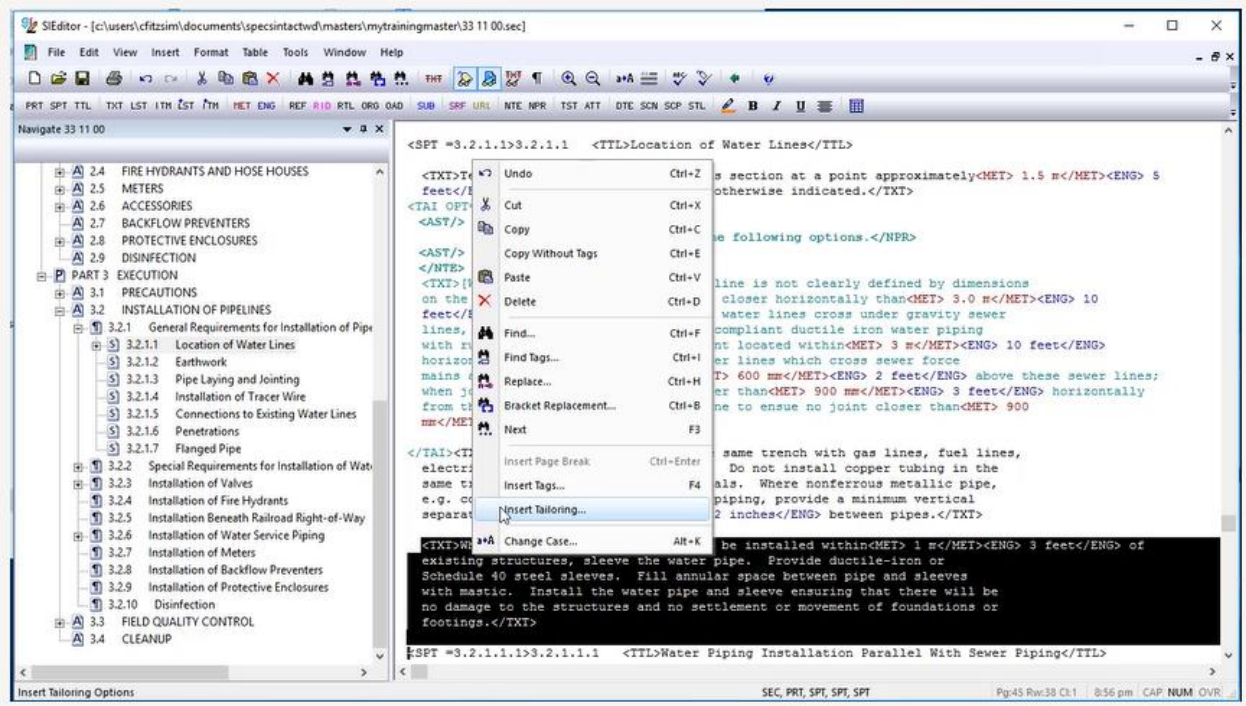
Enter NAVY then *select* **OK**.



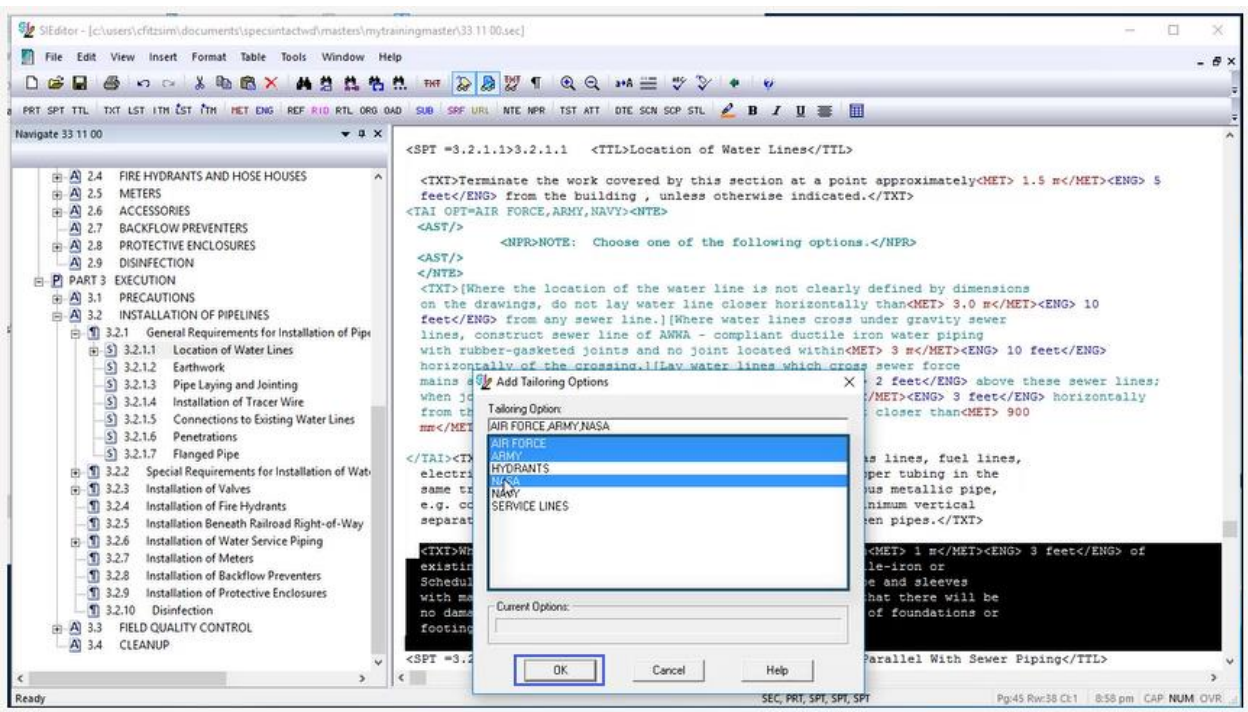
The Tailoring Tag now reflects AIR FORCE,ARMY,NAVY. Modifying the Tailoring Tag is much better than going through the trouble of deleting the tag and adding it back in. As we continue, we are going to use a different technique to Tailor the last paragraph in this Subpart for AIR FORCE, ARMY, and NASA.



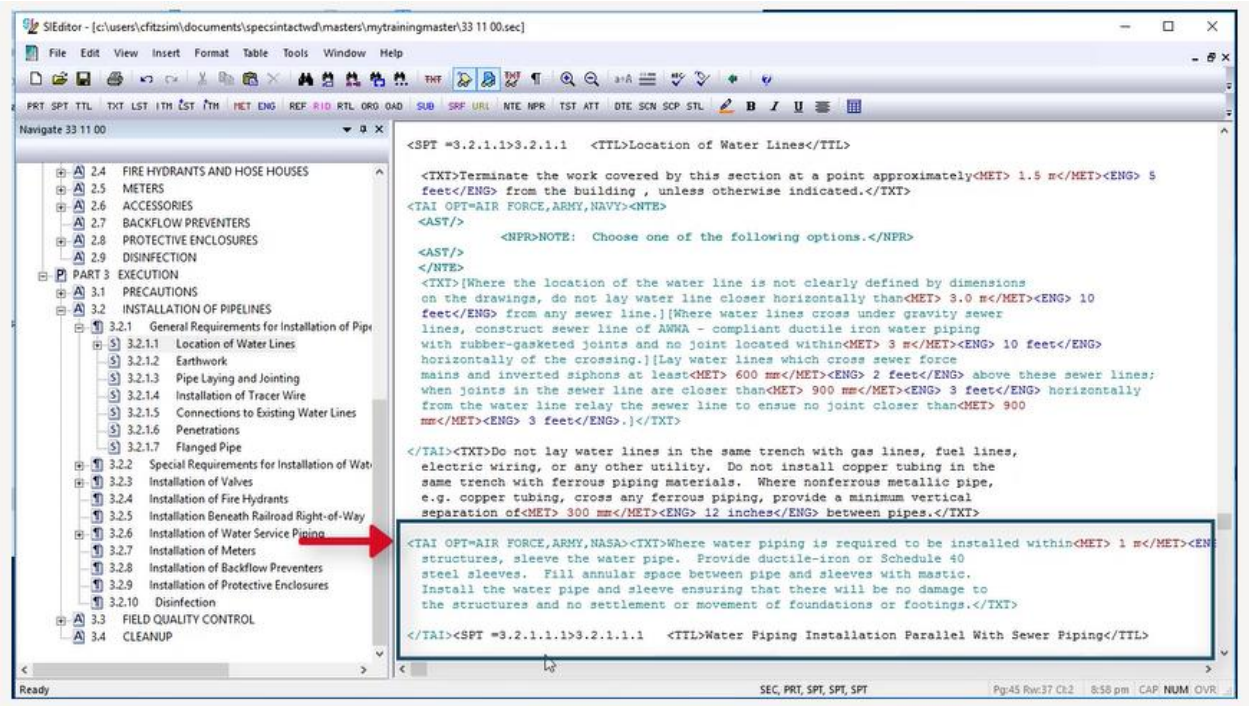
Let's position our cursor before the beginning <TXT> Tag and highlight stopping just before the beginning <SPT =3.2.1.1.1> Tag. *Mouseover* the highlighted area, *right-click* and *select* **Insert Tailoring**.



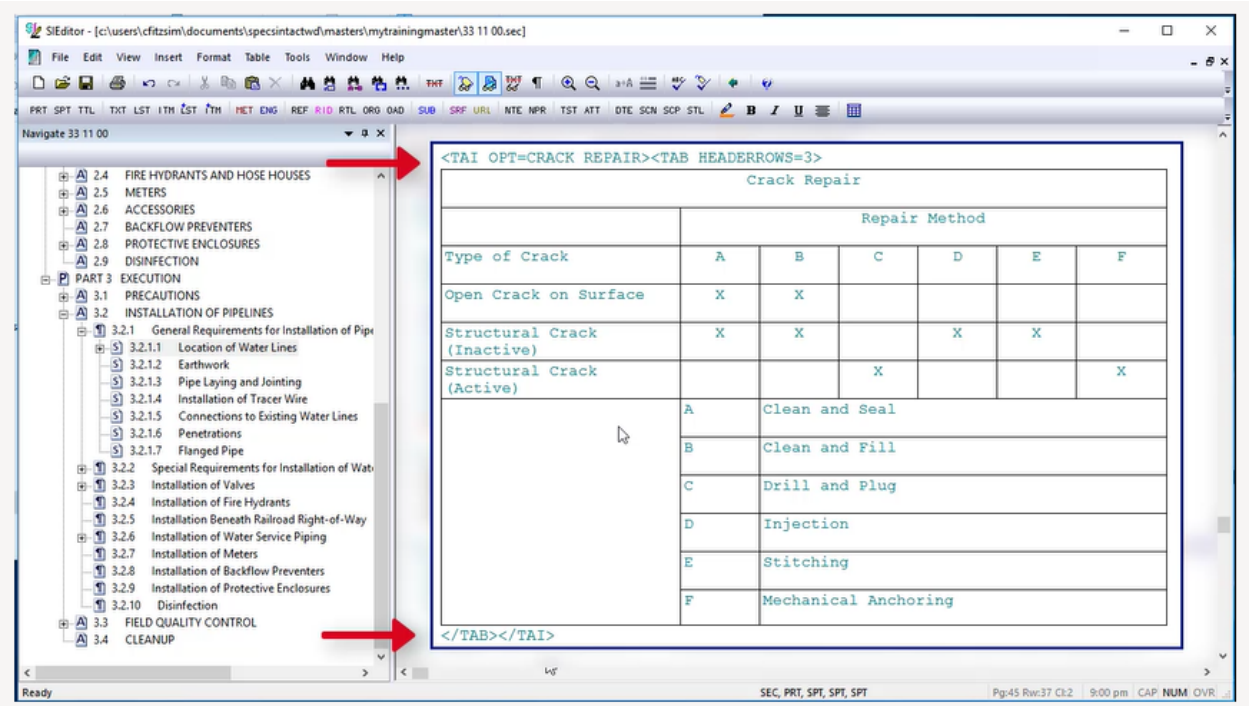
This time we are going to select the Tailoring Options from the list. Just as you can in Windows Explorer, we can use the Shift Key to select consecutive items or the Ctrl key to select non-consecutive items. Let's go ahead and *hold down* the **Ctrl Key** and *select* **AIR FORCE, ARMY, and NASA**.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



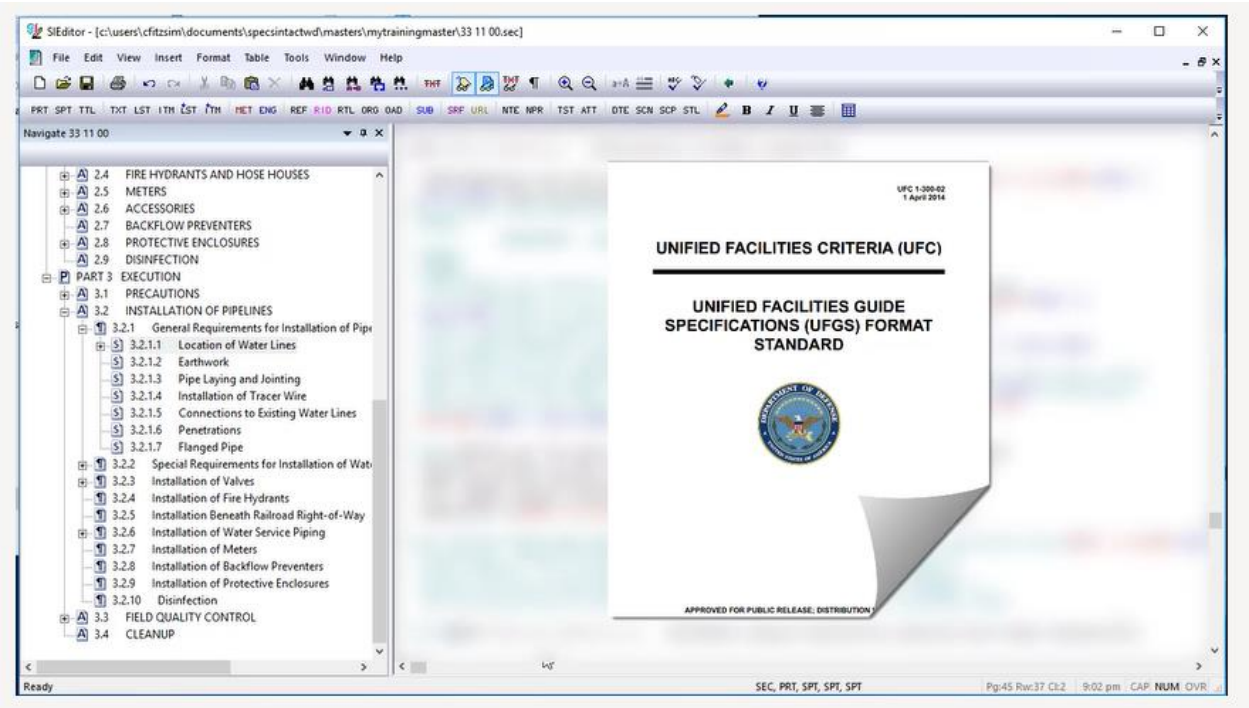
As you see, we have all three Options within our Tailoring Options Tag.



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.

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eLearning Module Notes: