

masterspec



NEXT² gen

masterspec

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1: LOGGING INTO MASTERSPEC

Go to Masterspec.co.nz

To get into NextGen2, click the **Log In** button on the right hand side of the web page.

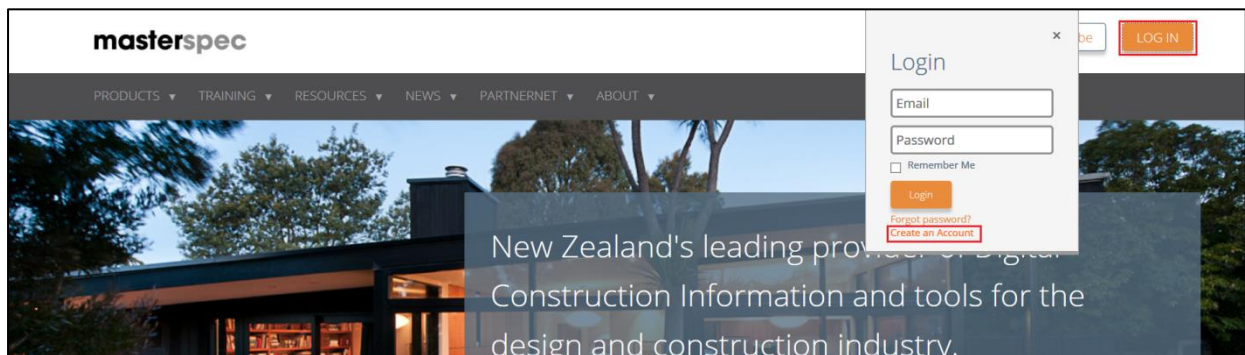
All system users **must be registered with individual logins** before they can access Masterspec NextGen2. If you have already registered, then login using your email address and password.

HELP DESK: Phone: 09 631 7044 Email: gen@Masterspec.co.nz

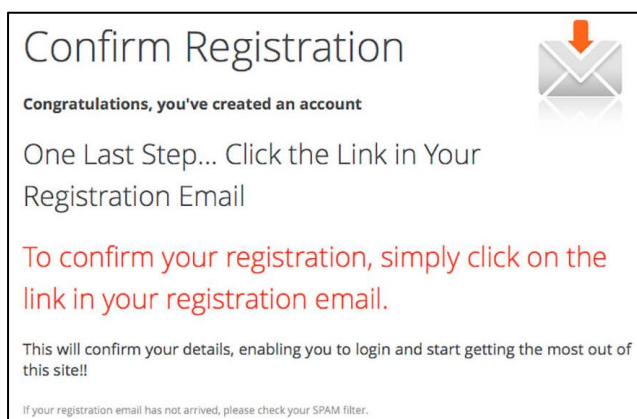
Setting up a Masterspec Login

If you do not have an individual login registration, you must **create a Masterspec user account** using your current practice email address and a personal password by filling out the required fields.

1. Click on LOG IN and then to **Create an Account** link.

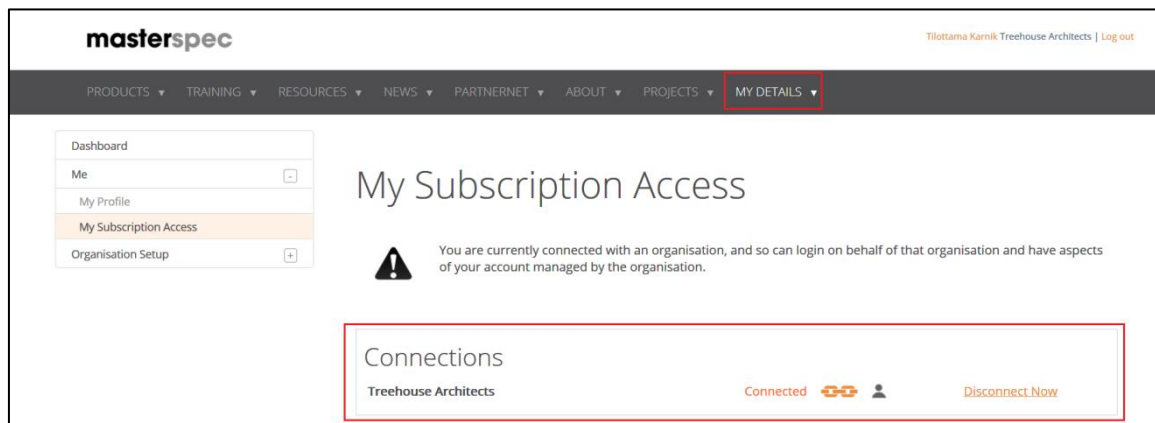


2. Once you have filled in the required fields, you will be sent an email to activate your account. You must confirm by replying to activate your account. When your account is activated, login using the link from www.Masterspec.co.nz.



3. In order that you can view and create practice specifications, it is necessary to connect to your practice account.

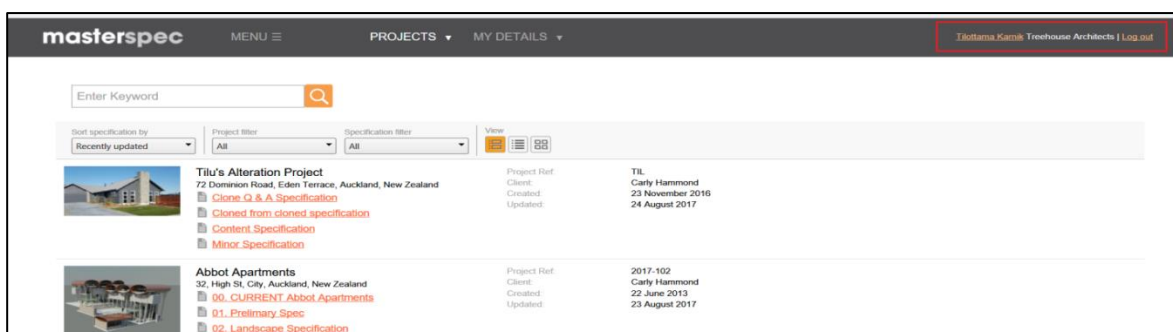
Click > **My Details** tab and select > **My Subscription Access** from the dropdown menu bar. Click the **Connect Now** icon.



4. To identify that you have connected to your practice;

- Your name and in some cases your practice logo, will be on the top right hand side of the screen.

If you cannot see these key indicators, then please refer back to your practice Master Administrator.



TROUBLESHOOTING

Can't login? Check your CAPS LOCK, or click "Forgot Password".

If you fail to log in successfully more than 3 times, please contact Masterspec to reactivate your password

Projects Page View

Logging into Masterspec will ensure that you arrive on the **Home Page** containing a summary of practice specifications and projects, a list of specification writers associated with the practice, recently updated Worksections from Masterspec and current practice subscriptions through Masterspec.

Search Function

To find a particular specification, you can use the **search function**. You can search with key words in the project/specification listing and by status.

masterspec

MENU

PROJECTS

MY DETAILS

Tikotama Kamik Treehouse Architects | Log out

Enter Keyword

Sort specification by

Project filter

Specification filter

View

Recently updated

All

All

Tilu's Alteration Project
72 Dominion Road, Eden Terrace, Auckland, New Zealand
[Clone D & A Specification](#)
[Cloned from cloned specification](#)
[Content Specification](#)
[Minor Specification](#)

Project Ref:

Client:

Created:

Updated:

TIL

Carly Hammond

23 November 2016

24 August 2017

Abbot Apartments
32, Hill St, City, Auckland, New Zealand
[CURRENT Abbot Apartments](#)
[Preliminary Spec](#)
[Landscape Specification](#)

Project Ref:

Client:

Created:

Updated:

2017-102

Carly Hammond

22 June 2013

23 August 2017

Search function

Grid View

List of projects and associated specifications

Grid View

Use the **Grid View** to view a list of specifications (similar to a spreadsheet view). Grid View also has a sort function which can be used by clicking on any column. Clicking again reverses the sort.

masterspec

MENU

PROJECTS

MY DETAILS

Tikotama Kamik Treehouse Architects | Log out

Enter Keyword

Sort specification by

Project filter

Specification filter

View

Newest

All

All

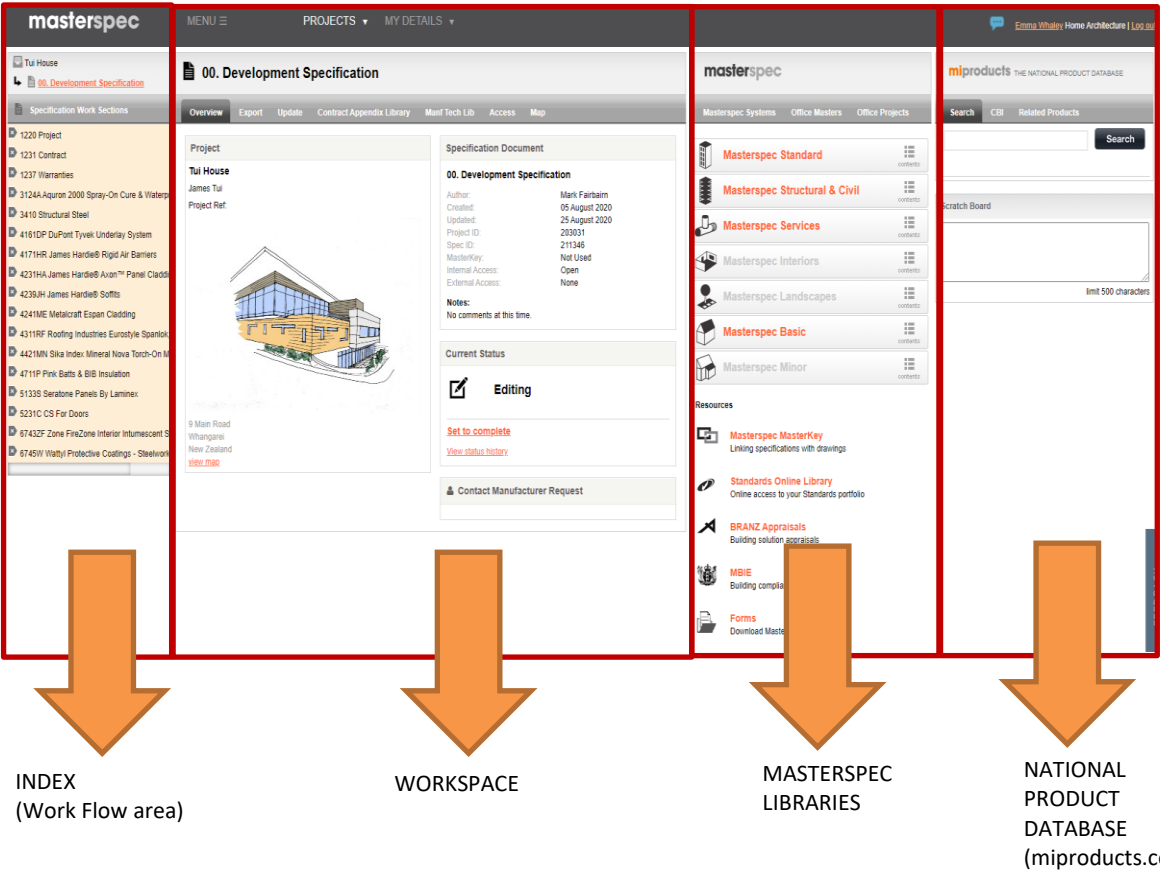
Click a column name to re-set the sort order.

PROJECT REF	PROJECT NAME	SPECIFICATION NAME	CLIENT	AUTHOR	CREATED v	DUE	UPDATED	STATUS
	House Alterations	Project spec	J Smith	Tikotama Kamik	25 Aug,17	12 Oct,17	04 Aug,17	
	House Alterations	Project Specification	J Smith	Tikotama Kamik	25 Aug,17	12 Oct,17	04 Aug,17	
	New website	Project Specification New Website	New Test	Tikotama Kamik	04 Aug,17	25 Aug,17	04 Aug,17	
	Dwelling Alteration	BLANK	Ecoglow	Mark Fairbairn	16 Jun,17			
007	New Cafe - Copthorne	Main Specification	Jeremy Gestro	Jeremy Gestro	14 Jun,17	30 Jun,17	14 Jun,17	
007	New wing - Pavilions Hotel	Consent	Jeremy Gestro	Peter Cronin	09 Jun,17	31 May,17	15 Jun,17	
TIL	Tilu's Alteration Project	Minor Specification	Carly Hammond	Trish Croot	06 Jun,17		04 Aug,17	

Page | 6

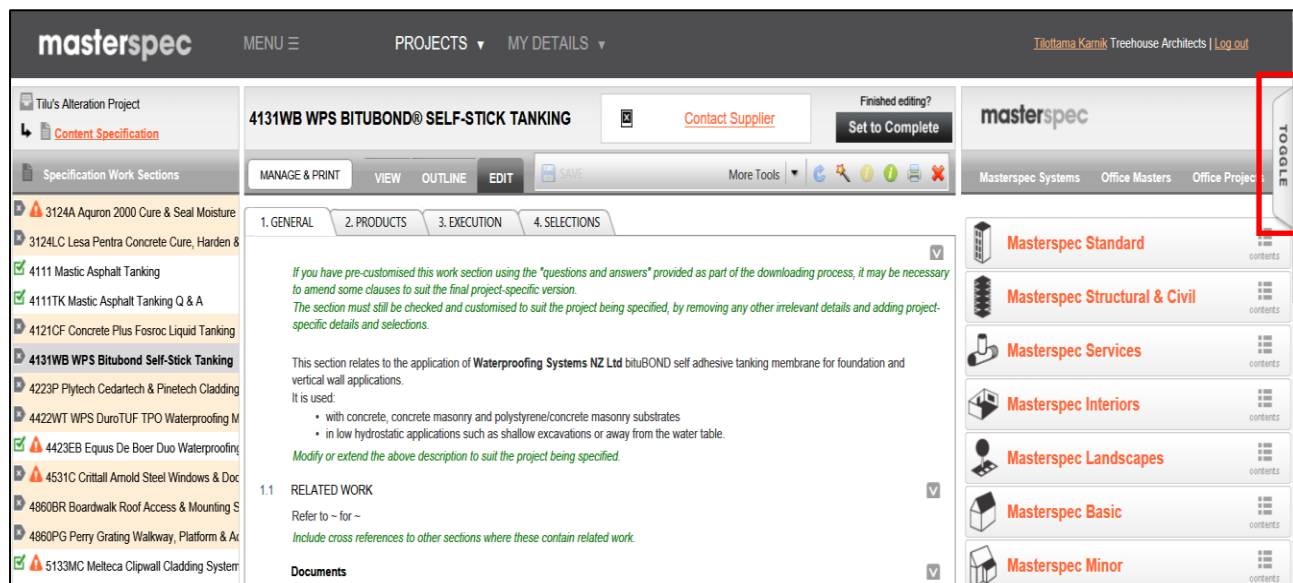
Project Overview Page

The **project overview page** is seen when you click on any specification from the Projects Page.

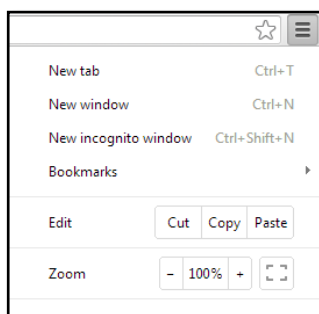


Resize Browser/Text

1. NextGen2 allows you to work comfortably with different screens / windows / text size. There are 4 panels (see pg 7).
2. If the screen or device size is too small to allow you to view all the panels at once, the outside panels will file in behind tabs. You can toggle the two panels on the right and left of the editing interface simply by clicking on the tabs which provide fly-outs to swap between contents.



3. You are able to resize your browser to fit all the columns on your screen by following the process as follows:



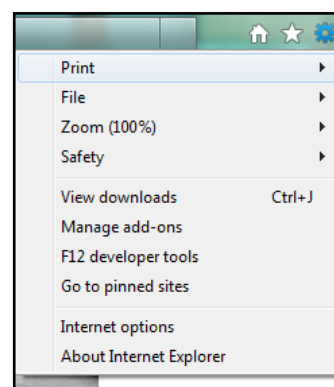
In Chrome: Click the Chrome Controls icon (⋮) in the top right hand corner of Chrome, select the Zoom function. Resize the zoom to 68% and then use the F5 key to refresh. This will reset the panels.

IE Explorer: Click the circle icon and zoom to 75%, Click F5 to refresh.

TIPS AND TRICKS

QUICK KEY:

Command/Ctrl - will reduce the screen content
 Command/Ctrl + will increase the screen content
 F5 to refresh size. Press F5 to refresh.



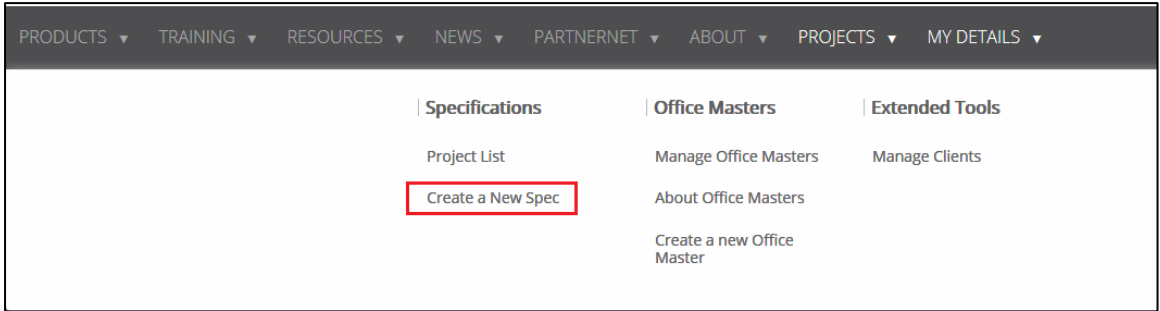
2: CREATING SPECIFICATIONS

Creating a New Specification Document

To create a **new Specification Document**, simply click on the **Add New Project** button on the **Dashboard**



or use the drop down menu under the **Projects** tab:



1. You can create the new specification in an **existing project** or start a **new project**.
2. **For an existing project** select from the drop down box, the appropriate project name.

A screenshot of the 'Create a New Specification' form. The form is titled 'Project Details' and 'Specification Details'. In the 'Project Details' section, there are two radio buttons: 'Existing Project' (which is selected and highlighted with a red box and a red arrow) and 'New Project'. Below this is a dropdown menu for 'Project' with the text '-- Select Project --'. In the 'Specification Details' section, there is a text field for 'Specification Name' with a red asterisk indicating it is required. Below this is a text field for 'Author' with the name 'Tilottama Karnik' entered. At the bottom, there are three radio buttons for 'Create specification from': 'Start blank' (selected), 'Clone an Office Master', and 'Clone an existing Specification Document'. There is also a 'Notes' section with a text area and a 'Confirm' button at the bottom.

Create a new specification from an existing or new project.

3. If it is a **new project** fill in the **required project details**.
4. **Create a new client**, select an existing client or "client details not required".

masterspec MENU PROJECTS MY DETAILS

Project Details

Type: ☐ Existing Project ☒ New Project

Client: -- Select Client -- [Create new Client](#)

Project Name:

Project Ref:

Image: [Browse...](#)
 (Allowed Extensions: JPG, GIF, PNG; Max File Size: 4MB)
 (Width:800px Height:600px)

Date Due:

5. Insert **Project Name** - this appears on the front cover of the specification document (generally the title of the Project).
6. **Project Reference**; insert the practice job / project number.
7. To **insert an image** which will appear on the front cover, select Browse to upload from your computer (jpeg files only)
8. The specification can have a **due date** which appears in the Grid View. Use this to manage the timing of your work.
9. Complete the **project address** details. This address links and locates your project correctly on a Map. (Project Overview screen).

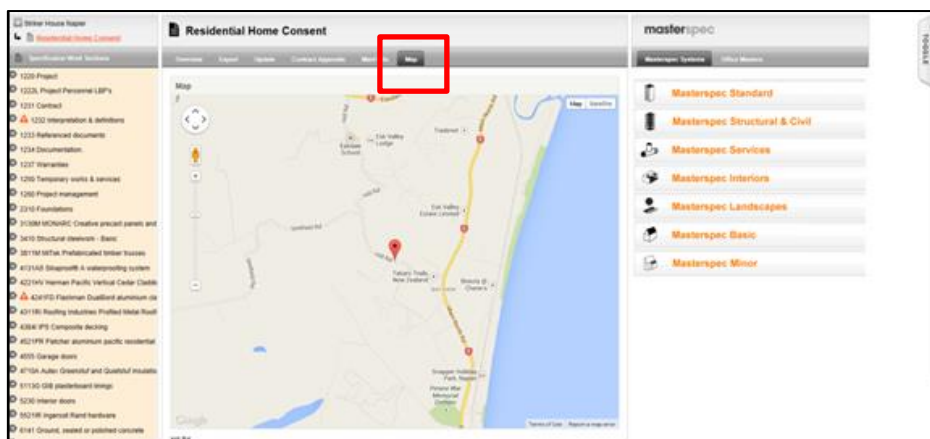
Project Address

Street:

Suburb:

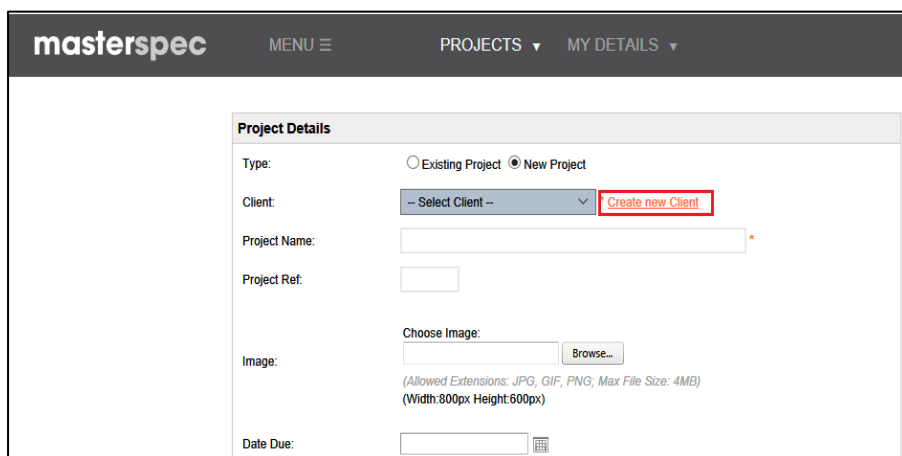
Town / City:

Country: New Zealand



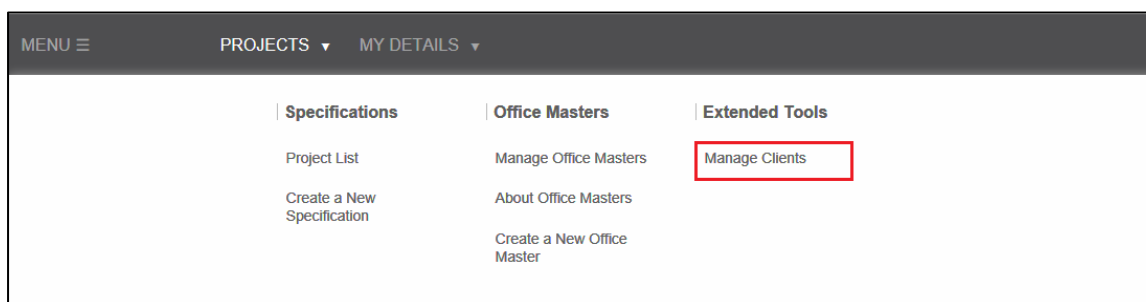
Create & Manage a Client

1. Click on Create new Client link when creating a new project.



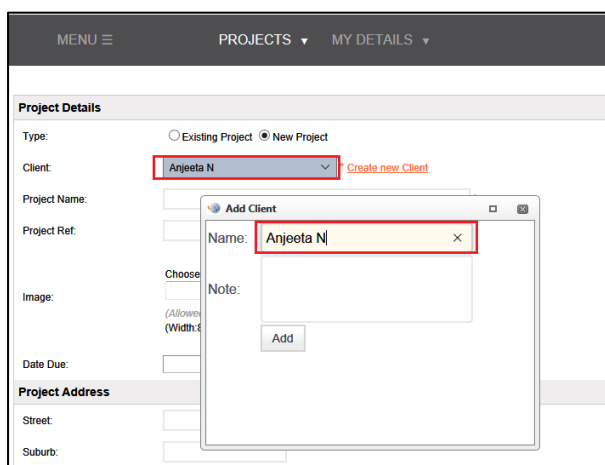
The screenshot shows the 'Project Details' form in the Masterspec application. The 'Type' is set to 'New Project'. The 'Client' dropdown menu is open, displaying a red box around the 'Create new Client' link. Other fields include 'Project Name', 'Project Ref', 'Image' (with a 'Browse...' button), and 'Date Due'.

OR hold the mouse on the drop down arrow of Projects tab and select Manage Clients



The screenshot shows the 'PROJECTS' dropdown menu. The 'Manage Clients' option is highlighted with a red box. Other options include 'Specifications', 'Office Masters', and 'Extended Tools'.

2. Create new Client link will allow you to enter information for new client to add it to Client box.



The screenshot shows the 'Project Details' form with the 'Add Client' modal open. The 'Name' field in the modal is highlighted with a red box. The modal also includes a 'Note' field and an 'Add' button. The background form shows the 'Client' dropdown menu with 'Anjeeta N' selected.

3. When you click on Manage Clients, you can add a new client or you can edit the existing clients.

The screenshot shows the 'Create a new client' form in the Masterspec application. On the left is a sidebar with a list of clients: ADNZ, ADNZ Conference, BIG HOUSE, Bob Smith, Carly Hammond, CHCH, Daniel Client Willis, Ecoglow, Fletcher Housing, Friedlander Ltd, HNZZ, J Smith, Jasmex, Jeremy Gestro, and JNL. The main area is titled 'Create a new client' and has a 'NEW' button. Below this is a 'Manage Client' tab. The form contains a 'Client' field with a dropdown menu, a 'Notes' text area, and an 'Add' button.

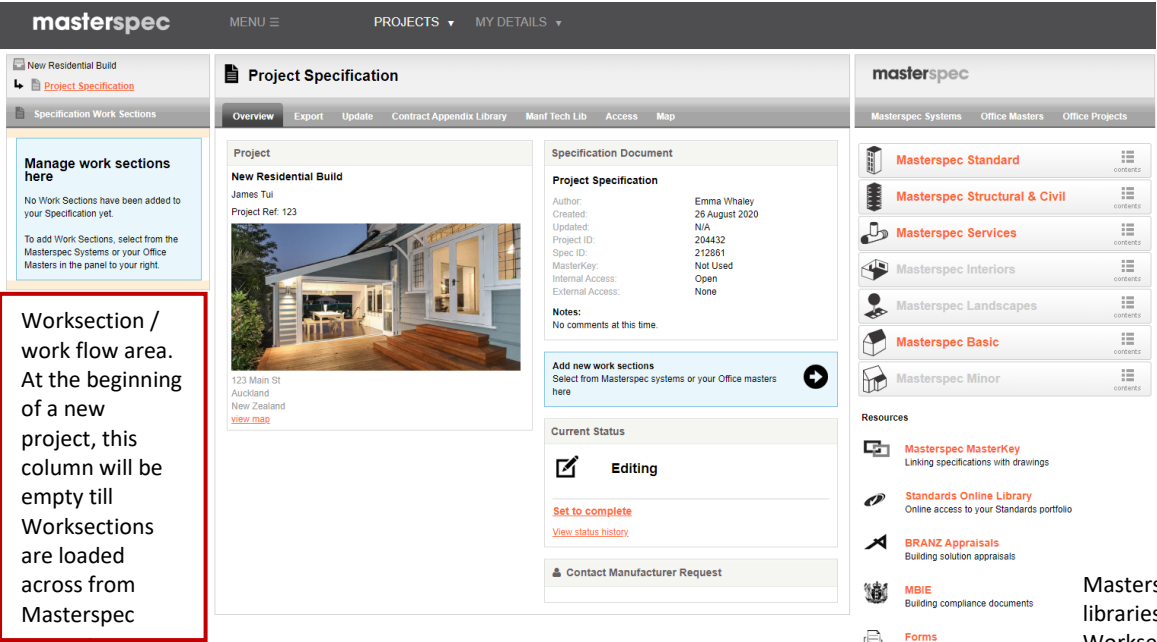
The screenshot shows the 'Manage Client' form for 'Carly Hammond'. The sidebar on the left is the same as in the previous screenshot, but 'Carly Hammond' is highlighted. The main area is titled 'Carly Hammond' and has a 'NEW' button. Below this is a 'Manage Client' tab. The form contains a 'Client' field with a dropdown menu showing 'Carly Hammond', a 'Notes' text area, and 'Update' and 'Delete' buttons.

STOP! There are three ways to generate a new document;

- Create a specification from Blank;
- Create a specification by cloning an Office Master
- Create a specification by cloning an existing specification.

1. Creating a Specification Document from Blank

A blank specification produces a new project that has no Worksections and will require Worksections to be added from the Masterspec libraries.



Worksection /
work flow area.
At the beginning
of a new
project, this
column will be
empty till
Worksections
are loaded
across from
Masterspec

Specification name

Status mode
of
specification

Project information

Masterspec
libraries
Worksections
arranged in CBI
code order.

Worksections are loaded from the right hand column libraries to the left hand column. The work flow area, forms the basis of the contents page. The contents page is created and can be viewed when exported.

2. Creating a Specification Document from an Office Master

Cloning a specification from an Office Master will **download all the Worksections** contained in that Office Master.

1. Select create a specification from an Office Master. Choose the appropriate Office Master from the drop down box.

Specification Details

Specification Name: *

Projects that will only have a single Specification Document should use the default value of 'Project Specification'. Otherwise a descriptive name should be entered.

Author:

Create specification from: ☐ Start blank ☒ Clone an Office Master ☐ Clone an existing Specification Document

Notes

- Select Office Master Spec -
- * Treehouse OM Brick Earth
- * Treehouse OM Commercial Warehouse
- * Treehouse OM P&G Commercial
- Treehouse OM P&G Sections
- * Treehouse OM Warehouse

2. Office Masters with an *asterix next to the section title are out of date and should be updated before using. Only users with permission can update an Office Master (refer to section **Intelligent Update Manager**).
3. Individual Office Master Worksections can be added into any project. (Refer to pg 16 **Adding Worksections from Office Masters to your Specification**).

TIPS AND TRICKS

We suggest you only start with a few Office Masters. They need to be updated monthly using the Update Manager. Refer to Masterspec Training Program "Office Masters".

2. Creating a Specification Document from an Existing Specification

1. To generate a document from an existing specification, choose the appropriate specification from the Select Spec drop down box.

Specification Details

Specification Name: *

Projects that will only have a single Specification Document should use the default value of 'Project Specification'. Otherwise a descriptive name should be entered.

Author:

Create specification from: ☐ Start blank ☐ Clone an Office Master ☒ Clone an existing Specification Document

-- Select Spec --

Notes

Confirm

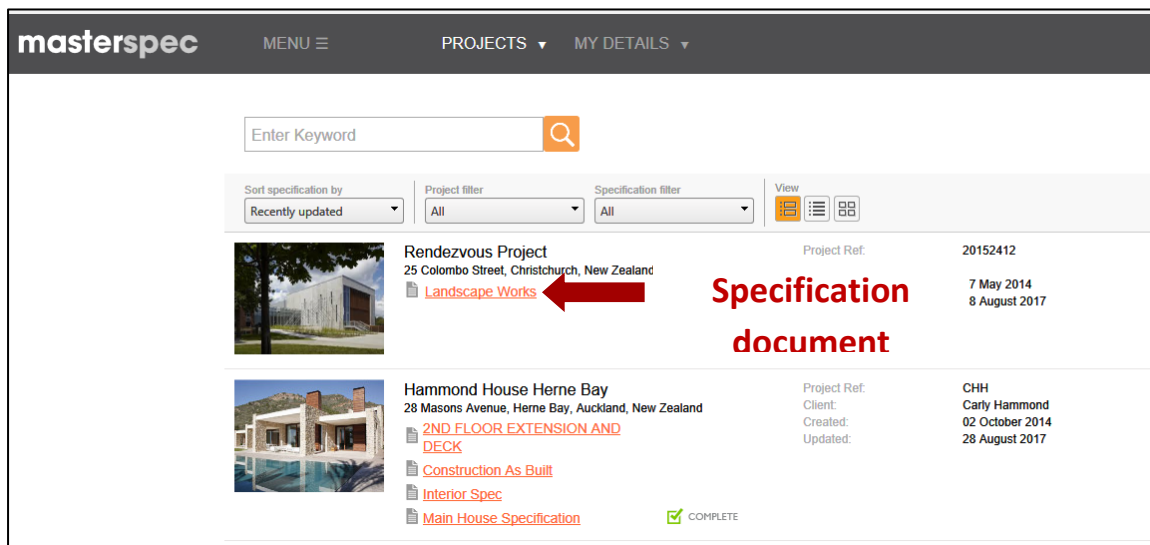
-- Select Spec --

- Abbot Apartments - CONSENT
- Abbot Apartments - WINDOW SPECIFICATION
- Alger Executive Residential Build - AS BUILT Specification
- Alger Executive Residential Build - New Building Consent
- Alger Executive Residential Build - New Building Construction Specification
- Bream Bay Residential Home - New Building Consent
- Bream Bay Residential Home - New Building Construction Spec
- Cutty House Project - Mi Building
- Cutty House Project - Minor
- Genesis Residential Project NPly - Residential Building Spec
- Genesis Residential Project NPly - Residential Specification Consent
- Hammond Apartments - Green Wing
- Hammond Apartments - Hammond Apartments Specification

2. Consider how old the project is **before** cloning an old specification. It may require a generous amount of updating using the update manager.

Open, Delete and Create a Specification

1. To open a specification



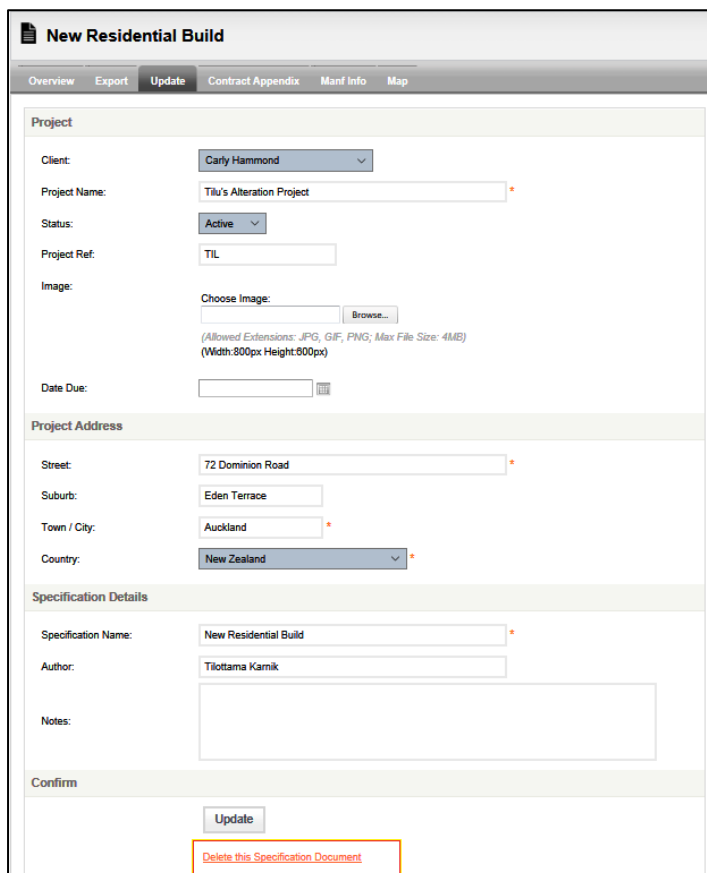
The screenshot shows the Masterspec web interface. At the top, there's a navigation bar with 'masterspec', 'MENU', 'PROJECTS', and 'MY DETAILS'. Below this is a search bar with 'Enter Keyword' and a magnifying glass icon. There are filters for 'Sort specification by' (Recently updated), 'Project filter' (All), and 'Specification filter' (All). A 'View' button is also present. The main content area displays two project entries:

- Rendezvous Project**: 25 Colombo Street, Christchurch, New Zealand. Project Ref: 20152412. Created: 7 May 2014. Updated: 8 August 2017. A red arrow points to the [Landscape Works](#) link.
- Hammond House Herne Bay**: 28 Masons Avenue, Herne Bay, Auckland, New Zealand. Project Ref: CHH. Client: Carly Hammond. Created: 02 October 2014. Updated: 28 August 2017. Links include [2ND FLOOR EXTENSION AND DECK](#), [Construction As Built](#), [Interior Spec](#), and [Main House Specification](#). A green checkmark and 'COMPLETE' status are shown.

1. Open the specification by clicking on the title of the specification from the **Projects Page**.

2. To Delete a specification

1. Click on the Update tab.

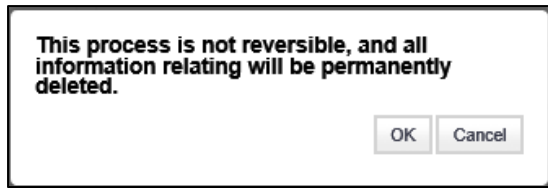


The screenshot shows the 'New Residential Build' project page in the 'Update' tab. The page has a tabbed interface with 'Overview', 'Export', 'Update', 'Contract Appendix', 'Main Info', and 'Map'. The 'Update' tab is active. The form contains the following sections:

- Project**: Client (Carly Hammond), Project Name (Tilu's Alteration Project), Status (Active), Project Ref (TIL), Image (Choose Image: Browse...), Date Due.
- Project Address**: Street (72 Dominion Road), Suburb (Eden Terrace), Town / City (Auckland), Country (New Zealand).
- Specification Details**: Specification Name (New Residential Build), Author (Tilottama Karnik), Notes.
- Confirm**: Update button and a red-bordered box containing the link [Delete this Specification Document](#).

2. Scroll to the bottom of the page.
3. Click on **Delete this Specification Document** link.

4. You will receive a message saying



5. Select **OK** to delete the specification document.

When starting a new project that is connected to MasterKey (Masterspec's Keynoting system), the core project **SHOULD ALWAYS REMAIN IN CONNECTION TO MASTERKEY**. For further information, please refer to Masterspec for additional training.

3: WORKSECTIONS

Adding in Worksections to your Specification

1. To add Worksections from the Masterspec library, click on the appropriate Library e.g. STANDARD.
2. Click on the appropriate tab or type a keyword into the search field and click **GO**.
3. Expand the section group by clicking on the grey arrow and click on the section title (orange underlined text) to add Worksections using the **Q&A feature**. By using the Q&A's, it will automatically pre-edit and remove clauses not valid to your current section.

STOP!

Masterspec provides a template only.

It is important for you to still edit the Worksection even after using the Q&A pre-edit selection tool

TIPS AND TRICKS

The **Q&A editor** allows you to pre-edit selections at the beginning of your specification. **YOU MUST STILL EDIT THE WORKSECTION** even after using the Q&A.

Masterspec Systems		Office Masters	
Standard			
1	2	3	4
General	Site	Structure	Enclosure
Tanking and pre-cladding (26)			
Wall cladding (90)			
Roofing and decking (29)			
Membrane roofing (33)			
Windows and doors (35)			
Glazing (14)			
4610 Glazing residential			
4610MR Metro glasstech residential glazing			
4610VR CSR Viridian residential glazing			
4611 Glazing exterior			
4611ME Metro glasstech exterior glazing			
4611VE CSR Viridian exterior glazing			
4612 Glazing Interior			
4612MI Metro glasstech interior glazing			
4612VI CSR Viridian interior glazing			
4614 Glazing speciality			
4614MS Metro glasstech speciality glazing			
4614VS CSR Viridian speciality glazing			
4621 Glass block walling			
4691G GSL Glassquad glazing films			
Insulation (17)			

4. Once a Worksection has been imported it will populate the specification section and workflow panel (as per the diagram). This panel can then be used as a work flow indicator for your writing team. A quick visual check will show whether a Worksection requires editing, is complete or has a Masterspec update that needs to be reviewed and approved - as the icon indicates. (Refer to Icon Indicator Key Page)

TIPS AND TRICKS

The Work Flow panel can be used to manage approval and signoff of Worksections after editing.

Index and work flow

The screenshot displays the Masterspec NextGen2 software interface for a project titled "New Building Construction Specification". The left sidebar shows a list of worksections with status icons. The main area shows the "Alger Executive Residential Build" project details, including a photo and a list of worksections with their status (e.g., "Set to complete", "View status history"). The right sidebar shows a "Standard" tab with a list of worksections and their status.

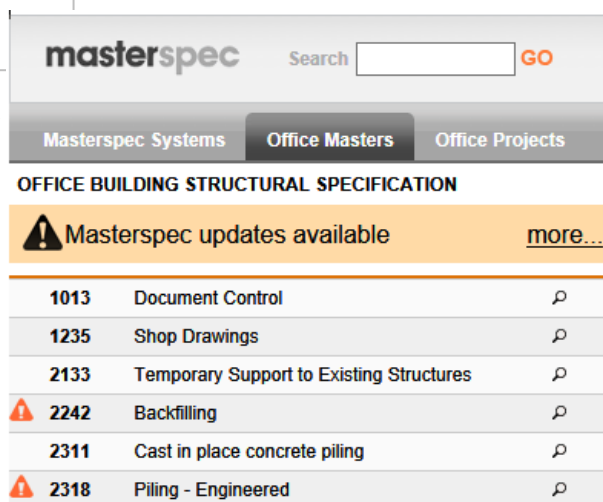
Adding Worksections from Office Masters to your Specification

1. Click on Office Masters tab and select the Office Master project from which you want to add Worksections from.



2. If you are adding a Worksection from an Office Master, and Masterspec has since updated the section, you will be notified of the updates. Only those with permission can create, modify or update the Office Master. (Refer to the section **Intelligent Update Manager**.)

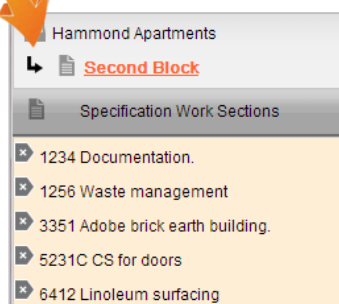
These sections have been updated by Masterspec and require updating



3. Continue building the specification by adding more sections. The sections you have added will now appear in your work flow panel.



To update an **Intelligent**



Office Master refer to the section **Update Manager**.

Adding Worksections from Office Projects to your Specification

Office Projects are the projects you have already created in the system before.

- 1. Click on Office Projects and select the Specification from which you want to add Worksections from.

Masterspec SystemsOffice MastersOffice Projects

All

All

Search

2017-102 Abbot Apartments

00_CURRENT Abbot Apartments

01_Preliminary Spec

02_Landscape Specification

2017-1234 ACC Central Libra

Preliminary Pricing Paint Specification

2017 ACENZ Conference Tower

Millie Opus

Stage 1 Levels 1-10 Specification for Consent

2017-123 Alex House

Residential Specification

Masterspec SystemsOffice MastersOffice Projects

Masterspec updates available

more...

Alex House - Residential Specification

1013	Document Control	⌵
1237	Warranties	⌵
3101LA	Concrete Work - Basic	⌵
3124LA	Finishes to Wet Concrete	⌵
3155MR	MAXRaft Floor System	⌵
6711R	Resene Painting Exterior	⌵

This section has been updated by Masterspec and require updating

[

- 3. Continue building the specification by adding more sections. The sections you have added will now appear in your work flow panel.

Tilu's Alteration Project

Content Specification

Specification Work Sections

1237 Warranties

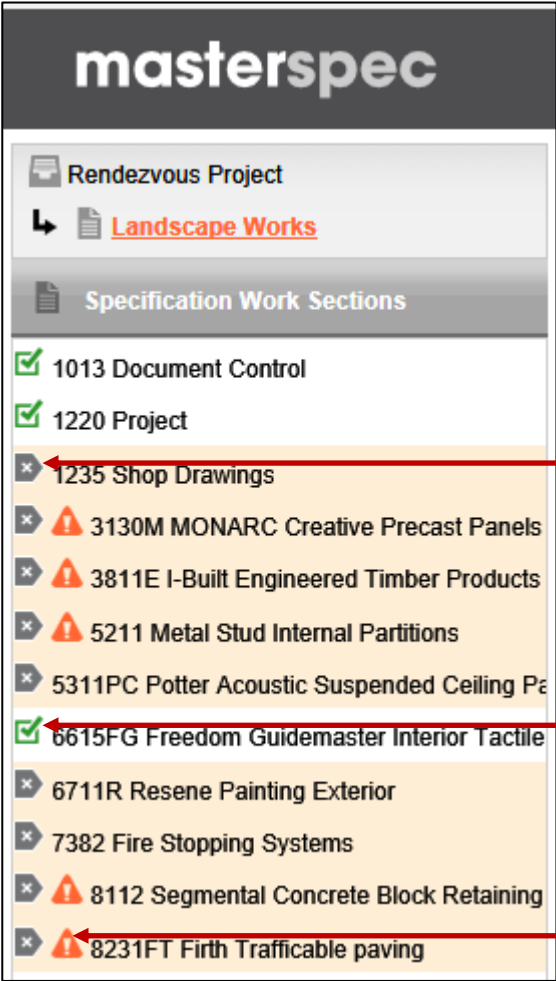
3114KC Knauf Climafoam XPS Concrete Slab

3124A Aquaron 2000 Cure & Seal Moisture

3124LC Lesa Pentra Concrete Cure, Harden &

3130M MONARC Creative Precast Panels & M

Icon Indicator Key



The Worksection is currently in draft and requires completion.

The Worksection is set to complete, it can be updated and edited simply by selecting it and placing the section in edit mode. **Don't forget to mark it as complete when you are finished.**

Masterspec has updated the Worksection, and it needs to be reviewed.

Using the Search Function for Masterspec Libraries

Use the search function above the library by typing in your requirement by CBI code or a key word and then clicking **GO**. You can search by brand, product type, subject and CBI code.

Your search results will be returned by subject title match and then by content. I.e. In this case Services, then by CBI number. The search function only returns results for the system library you are currently using. Be specific about your search i.e. Foul Water.

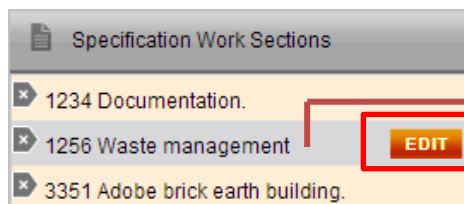
The screenshot shows the Masterspec search interface. At the top, the 'masterspec' logo is on the left, and a search bar with the text '7462' and a 'GO' button is on the right. Below the logo, there are three tabs: 'Masterspec Systems', 'Office Masters', and 'Office Projects'. Under these tabs, the 'Services' category is selected and highlighted with a red box. Below the category tabs, there are eight numbered buttons: 1 General, 2 Site, 3 Structure, 4 Enclosure, 5 Interior, 6 Finish, 7 Services, and 8 External. The '7 Services' button is highlighted with a red box. Below the category tabs, the search results are displayed. The first section is 'Search Results By Subject (1)', which contains one result: '7462 Wastewater Treatment System'. This result is highlighted with a yellow box. The second section is 'Search Results By Content (4)', which contains four results: '7420MD Marley dBlue Acoustic Sanitary System', '7441 Groundwater Drainage', '7461 Foul Water Drainage', and '7462 Wastewater Treatment System'. Each result has a document icon and a magnifying glass icon.

Search Results By Subject (1)	
7462	Wastewater Treatment System

Search Results By Content (4)	
7420MD	Marley dBlue Acoustic Sanitary System
7441	Groundwater Drainage
7461	Foul Water Drainage
7462	Wastewater Treatment System

Editing a Worksection within a Specification

- To edit a Worksection, click > **Edit** next to the Worksection title in the Specifications Worksections panel.



VIEW MODE

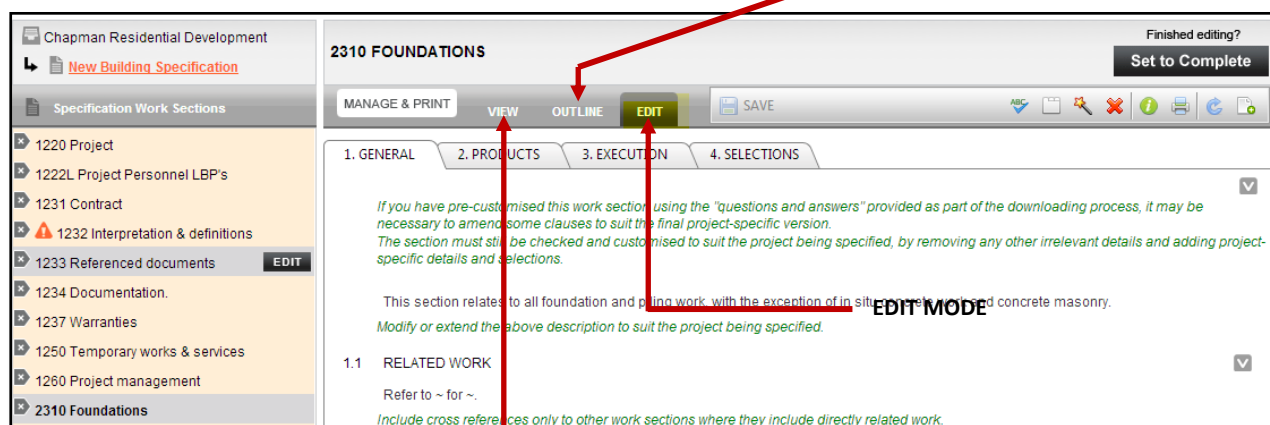
EDIT MODE

TIPS AND TRICKS

Clicking on the Edit icon on the Work Flow saves you opening the section in the default view mode.

- Alternatively, you can click > **Edit** on the toolbar;

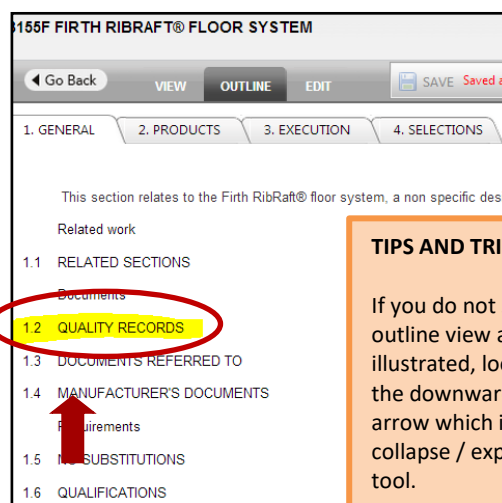
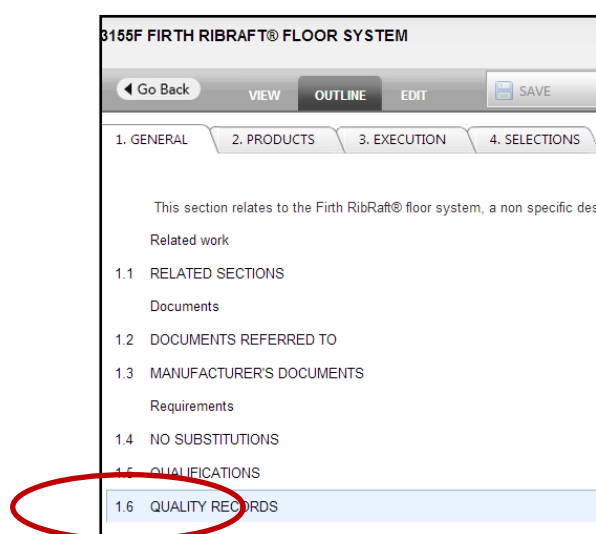
OUTLINE MODE



VIEW MODE:

Allows you to view freely around all Worksections (fastest mode) for reviewing sections.

Outline Mode: The Outline mode lists section titles and clause headings. It also allows you to move clauses up and down the order, **drag and drop to change the clause order**.



TIPS AND TRICKS

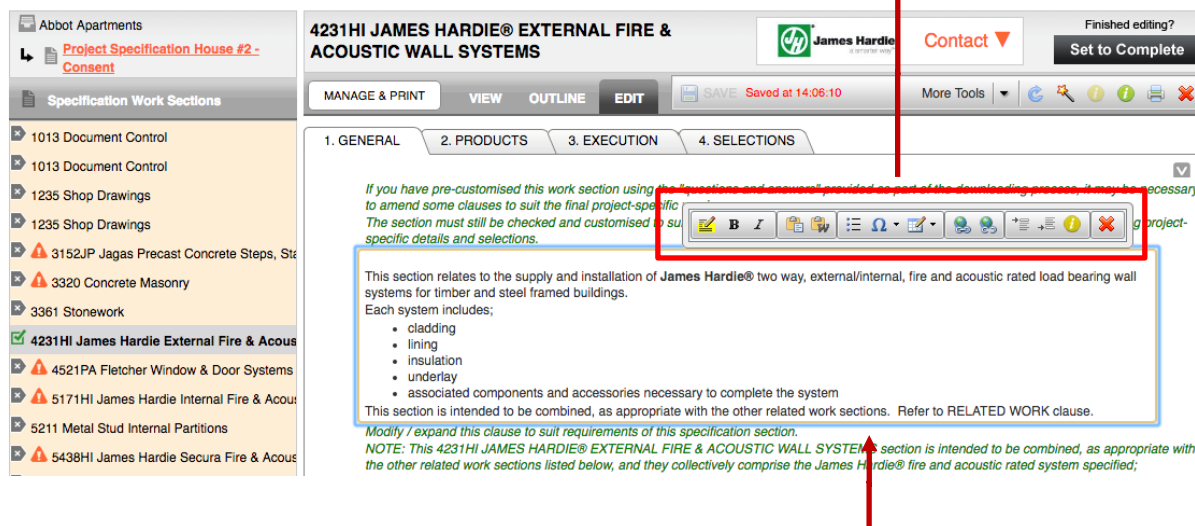
If you do not see the outline view as illustrated, look for the downward green arrow which is the collapse / expand tool.



Editing a Clause in a Worksection

Clause editing is as simple as click and edit. A text box appears and you are able to type within that text box or delete comments. When editing an existing clause you can type, delete, copy (Ctrl+C) and paste (Ctrl+V) text in the usual manner. (Note: In Chrome, please use Ctrl + Shift + V).

Edit clause tool bar contains customisation functionality



1. The system displays tools to edit the text.

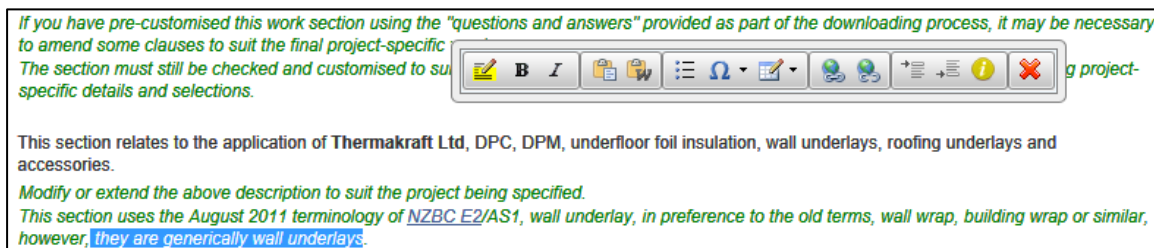
Text Box appears in edit mode

2. By highlighting the clause or any text you can perform the following functions (left to right icons) on the Clause Tool bar:

- Highlight text
- Bold
- Italics
- Paste rich text (alternatively can use short cut key Ctrl C, Ctrl V) including tables from Word
- Paste from Word, strip font
- Add bullet points (refer to note on bullets)
- Add symbols
- Add and manage tables (uses a right click function – refer to Tables)
- Add and manage hyperlinks
- Delete hyperlinks
- Insert row above or below table
- Turn on/manage Editor notes
- Delete the entire **contents** of the clause (not the clause heading or guidance notes). If you want the **whole clause deleted**, including the guidance notes, use Delete This Clause option from the Clause tool bar drop down available via the down arrow besides clause heading.

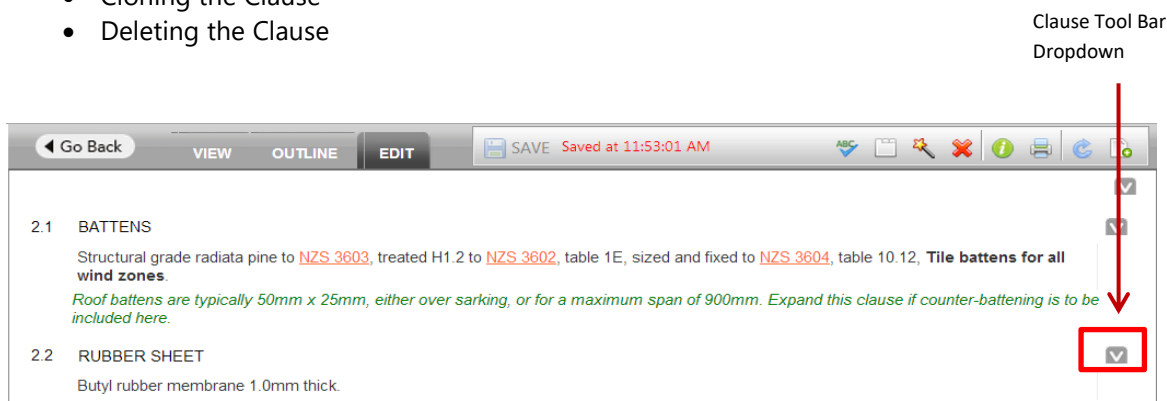
3. You can also **highlight then drag and drop guidance notes** (green) into the specification text (black). Note that each browser operates a little differently.

IE changes the text colour immediately. Chrome changes the text colour by clicking the **Reload** icon.

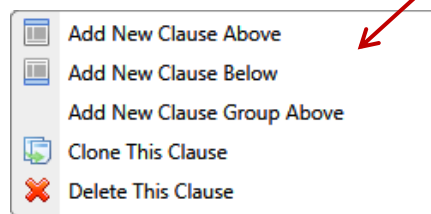


4. The **clause tool bar drop down** is available via the down arrow and contains other important functionality required for editing clauses in the Worksection. This functionality is:

- Add New Clause Above
- Add New Clause Below
- Add New Clause Group Above
- Cloning the Clause
- Deleting the Clause



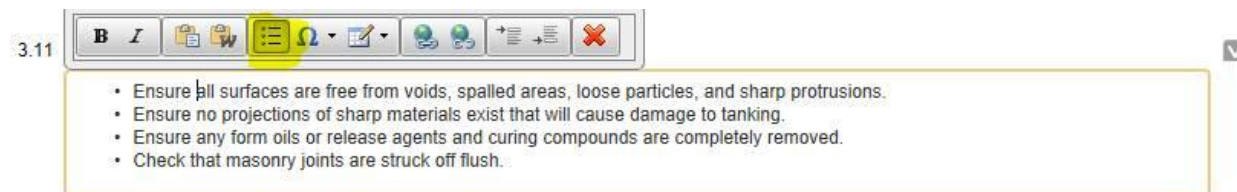
Grey downward arrow expands the drop down box with added functionality.



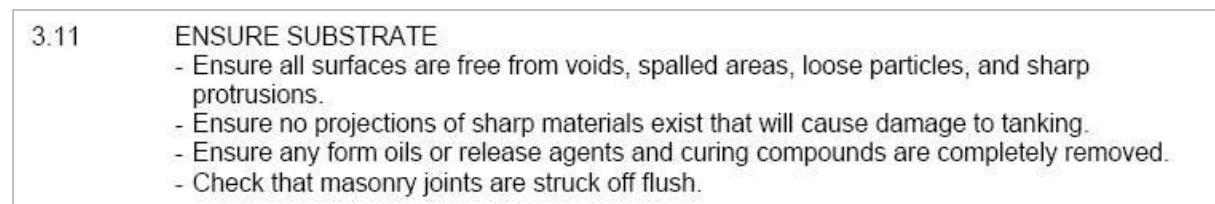
Using the Bullet Icon on the Clause Tool Bar

The bullet icon will ensure correct formatting of text within a clause. When the document is exported, the bullet exports as a dash –

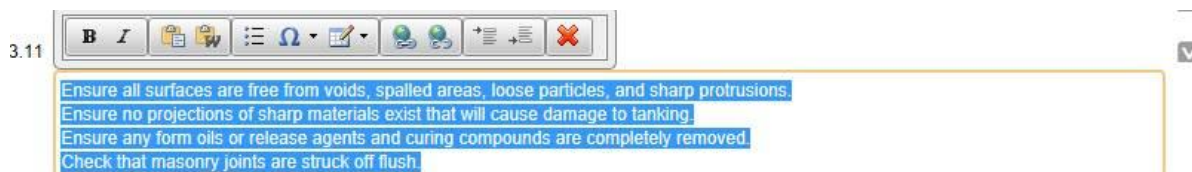
Here is an example:



The above exports as:



You can cut and paste text with bullets but it is better to delete them initially and format text left aligned. Then highlight the text and click the bullet icon.



Creating Entire Custom Clauses

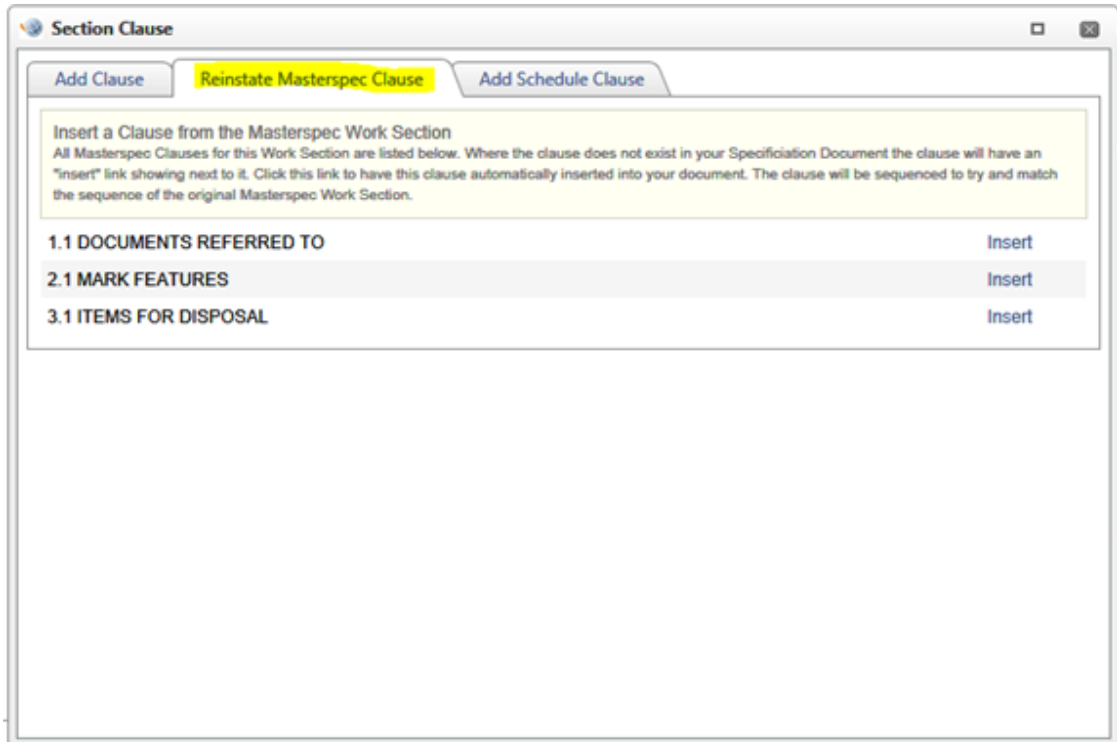
This is recommended for use if you have a specific clause that you use within your practice. You are able to copy and paste into the text box (as below).

1. Click on the **grey arrow** for the drop down box > click on **Add a New Clause Above** or **Below**.
2. Choose the **Add Clause tab** and type in a custom title (will automatically set case to caps) and custom content. > Click **Save Clause**.

The screenshot shows a window titled "Section Clause" with three tabs: "Add Clause" (highlighted in yellow), "Reinstate Masterspec Clause", and "Add Schedule Clause". Inside the "Add Clause" tab, there is a "Title:" label followed by a text input box. To the right of the input box is a dropdown menu with the text "-- Clause Templates --" and a downward arrow. Below the title input is a "Content:" label followed by a large, empty text area for pasting content. At the bottom right of the dialog are two buttons: "Save Clause" (with a floppy disk icon) and "Cancel".

Adding a New Clause Above / Below

- Click on Reinstate Masterspec Clause tab to add in a clause that has been either deleted during the Q&A process or removed. This is easily recognised by the **Insert** link.



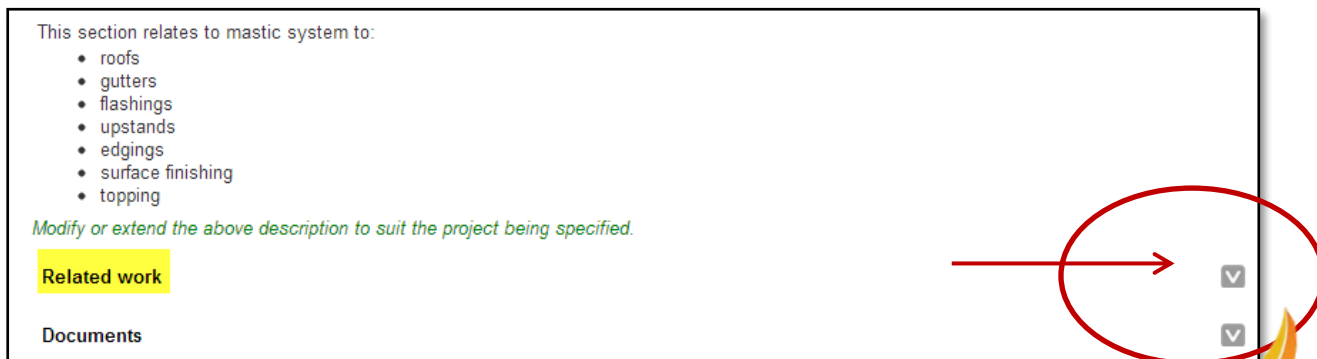
TIPS AND TRICKS

NOTE: Renumbering Clauses: Every time you add or delete a clause, the system will automatically re-number the clauses. If you want to force the update, use the reload button.

Adding a new Clause Group Above

1. Click on the **grey arrow** on the right of the clause for the drop down box, click on **Adding a new Clause Group Above**

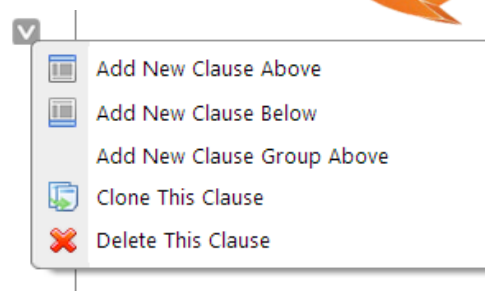
This will add in a new Clause Group Above – used as a section header between clauses.



Cloning a Clause

1. Click on the **grey arrow** on the right of the clause for the drop down box > click on **Cloning a Clause**.

Cloning will automatically repeat the clause word for word and insert it into your Worksection. Primarily used in the SELECTIONS tab where you have many products of a similar nature.



Deleting a Clause

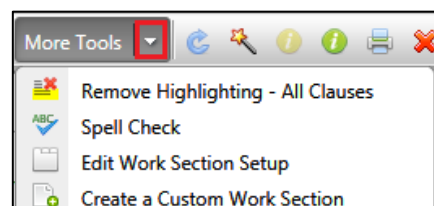
1. Click on the **grey arrow** on the right of the clause for the drop down box > click **Delete this Clause**

Deleting a clause will **remove the whole clause including any guidance notes** and will renumber the section automatically when you reload a new section. There is **no Undo**.

Worksection Toolbar

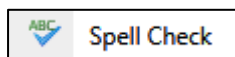
After editing clauses, the **Worksection Toolbar** lets you perform the following tasks on the Worksection you are editing.

- Remove Highlighting - All Clauses
- Spell Check
- Edit Worksection Setup
- Create a Custom Worksection
- Refresh
- Re-run the Q&A for this Worksection
- Show/Hide Editor notes
- Show/Hide Guidance notes
- Print this Worksection
- Delete this Worksection



Spell Check

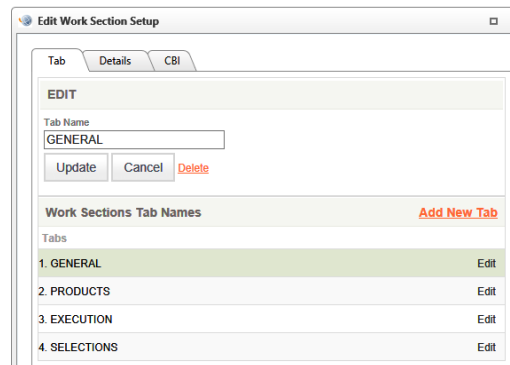
The spell check will check the whole Worksection for spelling errors, including checking inside the tables.



Edit the Worksection Setup

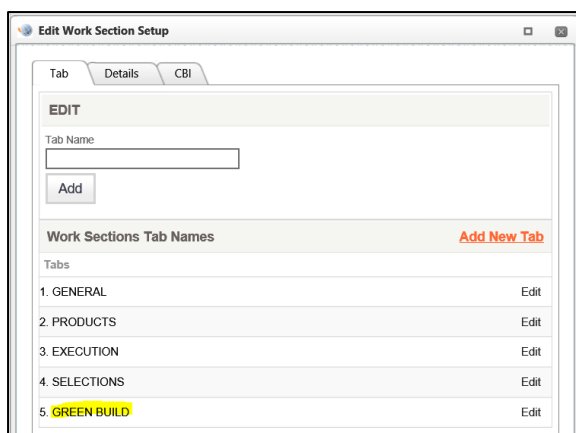
Edit Worksection Setup, will add, edit or delete the Worksection tabs.

1. Click the **Edit** button on the appropriate tab you wish to either **delete** or **change the name of**.
2. Change the **Tab** or alternatively **Delete** the tab if it is no longer required.
3. Click **Update** for changes to take place.

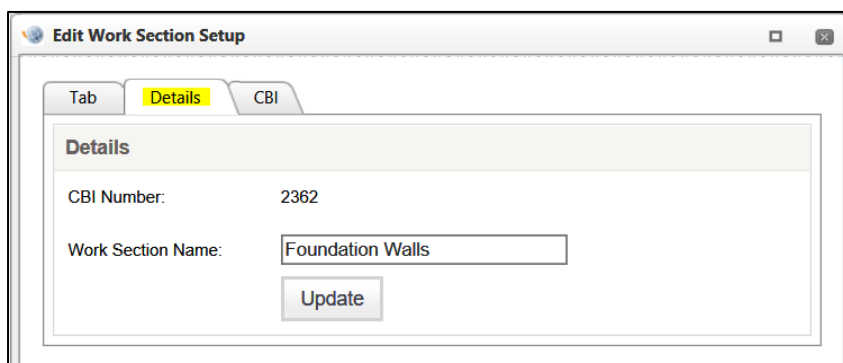


4. To add in a new **Tab Name** click on the link **Add New T**

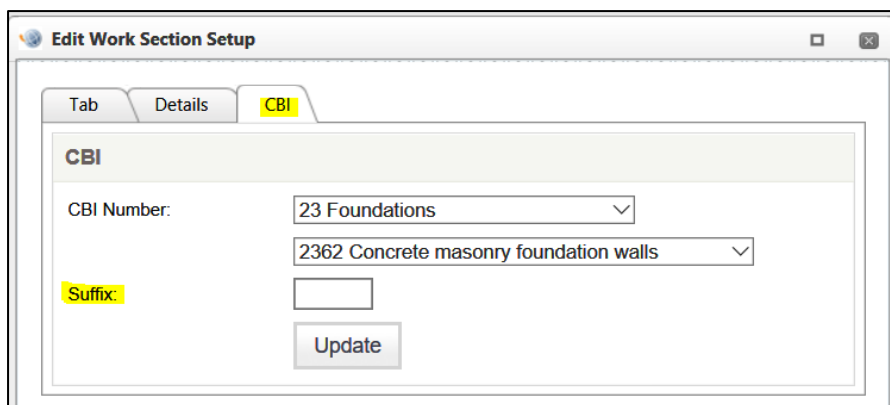
5. **Type in a name** i.e Green Build. Click **Add**. This will add in a new tab to the Worksection.



To change the name of the Worksection, click the Details tab, type it's new name.



You can update the 4 digit CBI code number by adding Suffix to it.

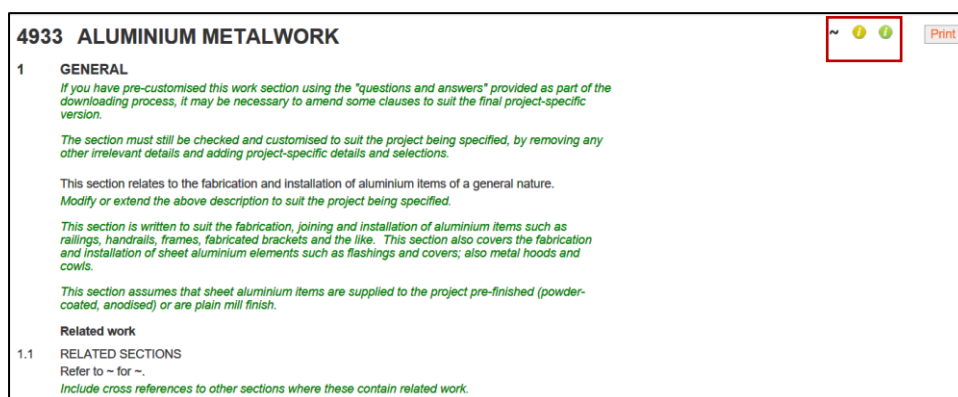


If you delete a tab or change the CBI code, AUTOMATIC UPDATES TO THE WORKSECTION WILL DISABLE. If the section is to be used on an ongoing basis (including cloning) it is best to not use these functions.

Printing an individual Worksection



1. You are able to print an individual Worksection by clicking the printer icon on the Worksection tool bar.
2. A pop up window will appear on the screen. Print can be seen in the top right hand corner.
3. You are able to turn off guidance and editor notes from printing by clicking the small green or yellow i.



Turning On and Off Guidance/Practice Notes

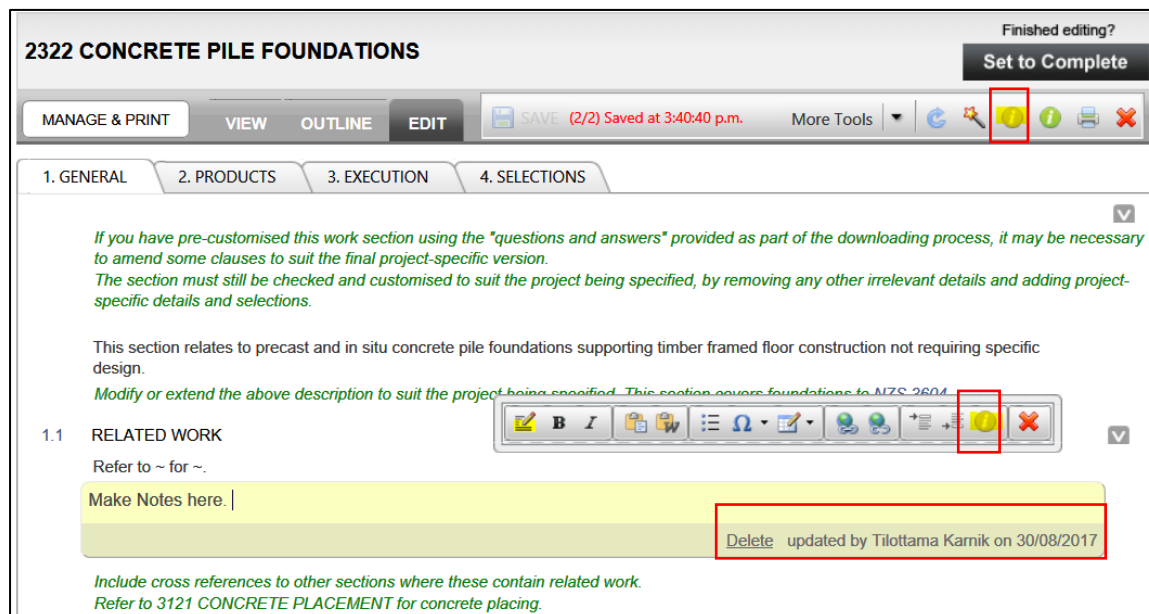
Guidance Notes are a prompt from Masterspec to you (the specifier), providing information on a particular clause. Guidance notes do not print when printing a full specification. You are able to turn guidance notes off and on by clicking the icon. Turning the guidance notes off will give you a better idea of what the printed version looks like.



Show Hide Editor Notes



The Editor Note Tool allows the user or Masters editors to write notes (like guidance notes or reminders) pertaining to a clause. These notes can also be written in Office Masters and are carried through as “practice notes” when cloned from any Office Master.



You should see this Editor Note icon on the task bar when you next click in a clause body text. Refer to the image above.

1. Click on the clause where you would like to attach the note or instruction.
2. Click the small yellow i icon on the clause tool bar. The yellow text box will appear.
3. Click into the yellow text box and type in your information. The notes are dated and named (see image). To remove the note click **delete** inside the note box.
4. The notes stay visible on the screen display but DO NOT print, when the document is exported.
5. You can turn the notes on and off by clicking the yellow i at the top of the Worksection menu.

TIPS AND TRICKS

When creating Office Masters, use the Editor Note Tool function for practice notes or instructions.

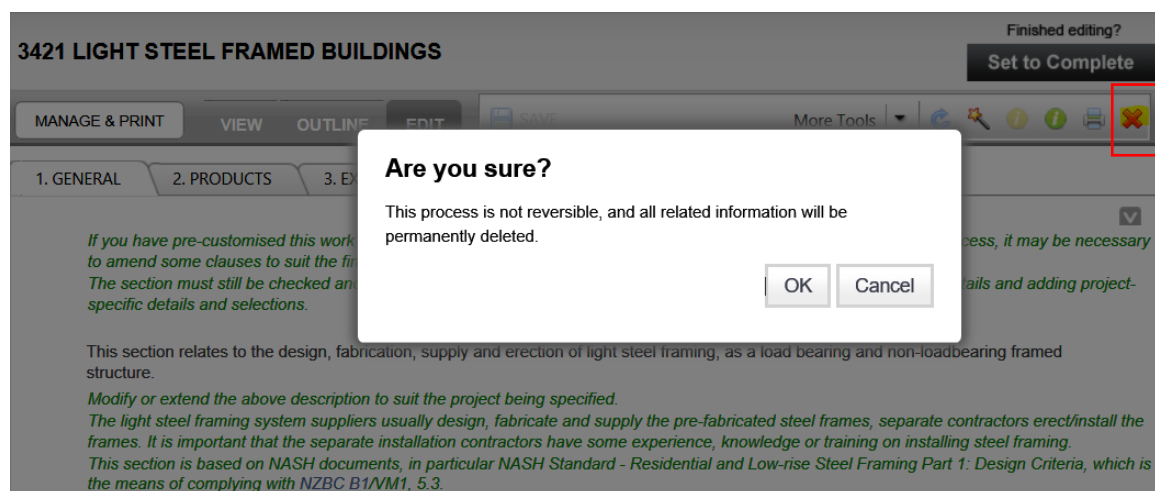
Reload Button



Reload is used to refresh or push the screen changes through if you want to review them immediately. It will also update Worksection numbering once clauses have been added or deleted. Simply changing clauses will also save any changes and updates to clause numbering.

Deleting a Worksection

1. You must be in **Edit** mode. Click on **Delete a Worksection (red cross)**. It will ask if you are sure. Once OK is clicked, it will **permanently** remove it from your Worksection flow on the left hand side. If you accidentally remove the Worksection, please call Masterspec on 09 631 7044 for support.

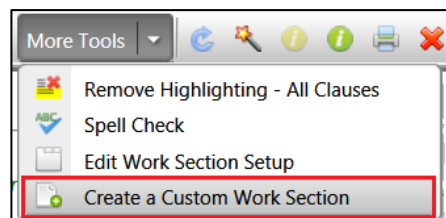


TIPS AND TRICKS

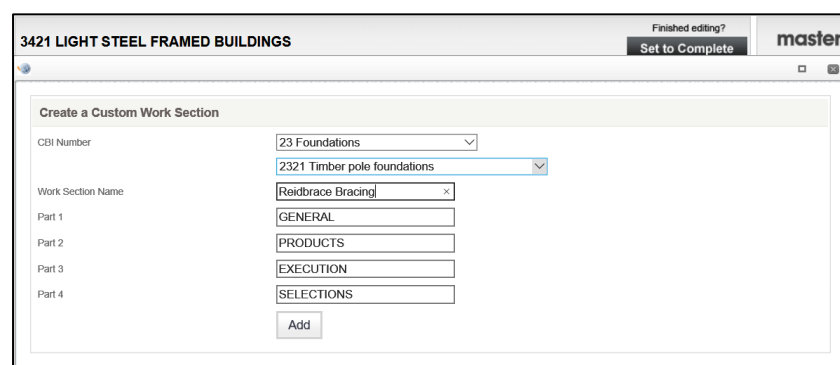
Once the Worksection is deleted there is no **BACK** button!

Creating a Custom Worksection

This is used when you wish to add in your own custom Worksection into your Masterspec Specification document.

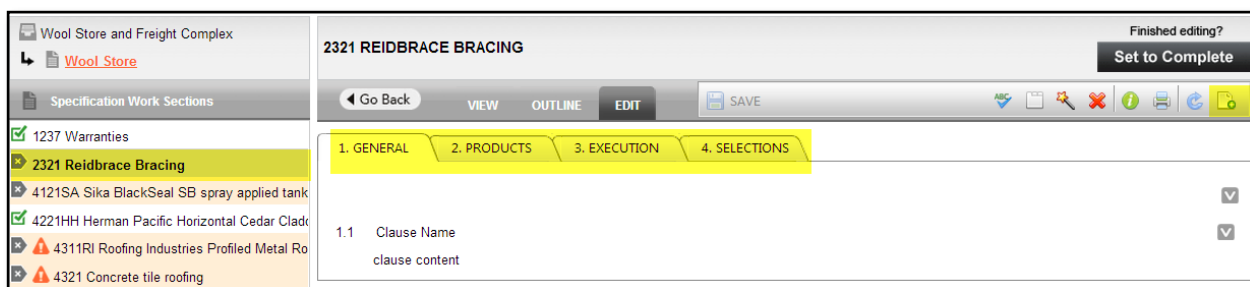


1. Click the button from More Tools drop down menu.



2. You will note that a customised Worksection is arranged by CBI Code. Choose the appropriate code before naming the Worksection.

3. The custom clause automatically populates 4 tabs – Part 1-4. The Worksection is seen in the Worksection flow column to the left and the new section is viewed and is ready for editing in the middle of the screen.

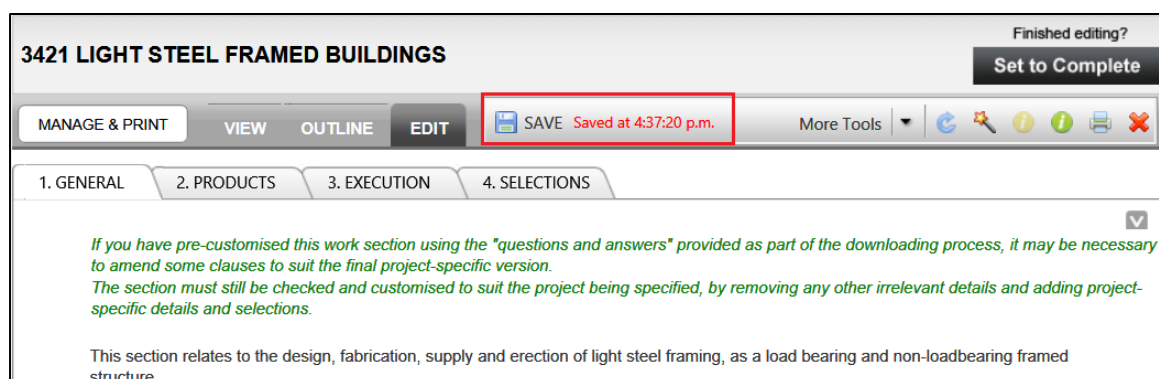


TIPS AND TRICKS

You can create custom work clauses in an Office Master as well. This will give all practice users access to your custom sections and clauses. Refer to pg 51 Office Masters.

Saving your Worksection

If you have made any changes once you are inactive after 5 seconds, your changes are saved. This save function is on the grey tool bar. When you are using the Outline view or tables, it is recommended to manually press the save button before you exit the screen. The save button is switched on only when in **Edit** mode.



When adding in a new Worksection to your specification, the Q&A pre-edit selection tool will automatically pre-edit and remove clauses not valid to your current section. **It is still important for you to edit the Worksection** even after using the Q&A pre-edit selection tool. The section is not complete till the final editing has been done. (Refer to pg 14 “Adding in Worksections to your Specification”).

1. You are able to **re-run the Q&A** to change your pre-edit selections while maintaining the majority of your customised clauses (as long as you have not downloaded the Worksection from an Office Master).
2. While in the Worksection, go to **Edit** mode.
3. Click on the **wand icon** in the tool bar.

4. A summary of the Q&A selections will appear on screen. At this point a full replacement can be selected which will overwrite all customisation. Alternatively, you can select **Merge Updated Sections** and any customisation you have made previously will be amalgamated, unless the clause has been replaced by the merge.

Page | 36

Merging the Current Section Using the Q&A for Office Masters

You cannot re-run the Q&A on a section downloaded from an Office Master as it has been created for a specific system or use for the practice. If you need to make selection changes, download it from the Masterspec System Library then complete the section as required for the project.

Managing Tables (and using right click)

Tables can be identified by the dotted line surrounding any text.

1.2 DOCUMENTS REFERRED TO

Documents referred to in this section are:	
AS/NZS 2312.2	Guide to the protection of structural steel against atmospheric corrosion by the use of protective coatings - Hot dip galvanizing
AS/NZS 4680	Hot-dip galvanized (zinc) coatings on fastenings
AS 1627.1	Metal finishing - Preparation and pretreatment of steel surfaces - Removal of oil, grease and related contamination
AS 1627.2	Metal finishing - Preparation and pretreatment of steel surfaces - Cleaning
AS 1627.4	Metal finishing - Preparation and pretreatment of steel surfaces - Abrasive blast cleaning
AS 1627.9	Metal finishing - Preparation and pretreatment of steel surfaces - Pictorial surface preparation standards for painting steel
AS 1897	Electroplated coatings on threaded components

Right-click context menu options:

- Insert Row Above
- Insert Row Below
- Delete Row
- Insert Column to the Left
- Insert Column to the Right
- Delete Column
- Delete Table
- Table Properties

1. Click on the cell you want to edit. Then right click to reveal the table menu items. Note that you are able **to only add/delete one row at a time** in any table.
2. It is advisable to view your tables in a print mode once you have completed adding in your information. To do this easily, click **Save** once you have finished. Click on the **print icon** in the Worksection toolbar. You can view this in a screen shot.
3. Tables are set by default without a border. If you wish to have the border on, right click then select Table Properties, select table-border from the drop down box.

Table Wizard

Table Properties

CSS Class Layout

table-border

Preview :

	Jan	Feb	Mar	Total
East	7	7	5	19
West	6	4	7	17
South	8	7	9	24
Total	21	18	21	60

TIPS AND TRICKS

Some browsers can cause issues with table layouts. If the tables are not lining up, it is beneficial to insert another column at the end of the row to assist with spacing. Remember to check in print mode.

Making more space in column 1 – sometimes you need a larger space in column 1 especially if there is a larger amount of text. You can add a third column (instead of two columns) to the right of the 2nd column. This formats the first column of cells slightly larger.

NZIA SCC Contracts	Submit all warranties no later than the date of the contractors advice of achieving practical completion.
NZS 3910 Contracts	Submit all warranties before the end of the defects liability period.
NZS 3915 Contracts	Submit all warranties before the end of the defects liability period.

Copying and Pasting Tabbed Text

Because Masterspec works on recognising clause text, it is necessary to manually copy text from Word and paste it into the specification on NextGen2.

After working through this process, the fastest way to do this when working with tables is to follow the below procedure, rather than copying line by line.

1. In your Word document, convert the two column tabbed text to a table.

DOCUMENTS
Refer to the general section 1233 REFERENCED DOCUMENTS. The following documents are specifically referred to in this section:

NZBC E2/AS1	External moisture
AS/NZS 1170.2	Structural design actions - Wind actions
AS/NZS 2908.2	Cellulose-cement products - Flat sheet
NZS 3602	Timber and wood-based products for use in building
NZS 3604	Timber-framed buildings

2. Use the mouse to highlight the text.

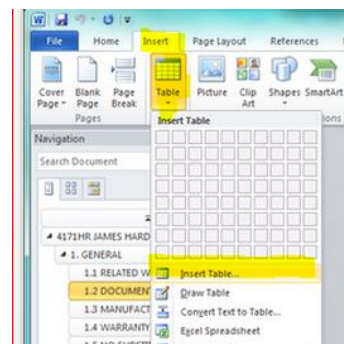
1.2 DOCUMENTS
Refer to the general section 1233 REFERENCED DOCUMENTS. The following documents are specifically referred to in this section:

NZBC E2/AS1	External moisture
AS/NZS 1170.2	Structural design actions - Wind actions
AS/NZS 2908.2	Cellulose-cement products - Flat sheet
NZS 3602	Timber and wood-based products for use in building
NZS 3604	Timber-framed buildings

3. Click on the Insert TAB, Table and Insert Table. This will automatically format the tabbed text into a table with a border.

DOCUMENTS
Refer to the general section 1233 REFERENCED DOCUMENTS. The following documents are specifically referred to in this section:

NZBC E2/AS1	External moisture
AS/NZS 1170.2	Structural design actions - Wind actions
AS/NZS 2908.2	Cellulose-cement products - Flat sheet
NZS 3602	Timber and wood-based products for use in building
NZS 3604	Timber-framed buildings



4. At this point, **remove any highlighting, or formatting of text**. i.e bold. NOTE: You are able to copy hyperlinks through but they will be disabled and need to be reconnected.
5. To copy the table; there are two ways to do this.

Select text box columns, Ctrl + C

WARRANTY - MANUFACTURER/SUPPLIER
Provide a material manufacturer/supplier warranty:

15 years:	For HomeRAB® PreClad™ Lining and RAB® Board (refer to James Hardie™ product warranty)
15 years:	For accessories supplied by James Hardie (refer to James Hardie™ product warranty)
From:	Date of purchase

or alternatively use the icon at the top of the table as per diagram. Click on the + sign and press Ctrl +C to copy.

Brand:	Novahush 900 (Forman Building System) Click here for link.
Location:	Ideal placed on the suspended ceiling as a 1200mm wide blanket, 600mm either side of the partition between rooms:
NRC:	0.83
Thickness:	94mm
STC:	STC 45
Blanket size:	600mm x 11.1m
Weight:	900g/m²
Density:	9.5kg/m³
Colour:	white

6. In NextGen2, select the Worksection you are pasting into and insert a new clause into the specification exactly where you want the new information to go. (Refer to the Training Guide for Inserting a New Clause).

- Choose the Add Clause option; type in a placeholder title (ie New).
- Click Save Clause
- Do not paste text into this box
- The specification will update and the new clause will be added ready for editing.

Section Clause

Add Clause | Reinstate Masterspec Clause | Add Schedule Clause

Title: NEW

-- Clause Templates --

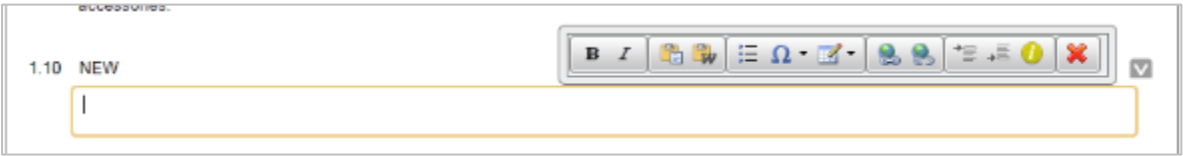
Content:

Save Clause | Cancel

7. Click on the space under the word NEW, which will be the blank text box.

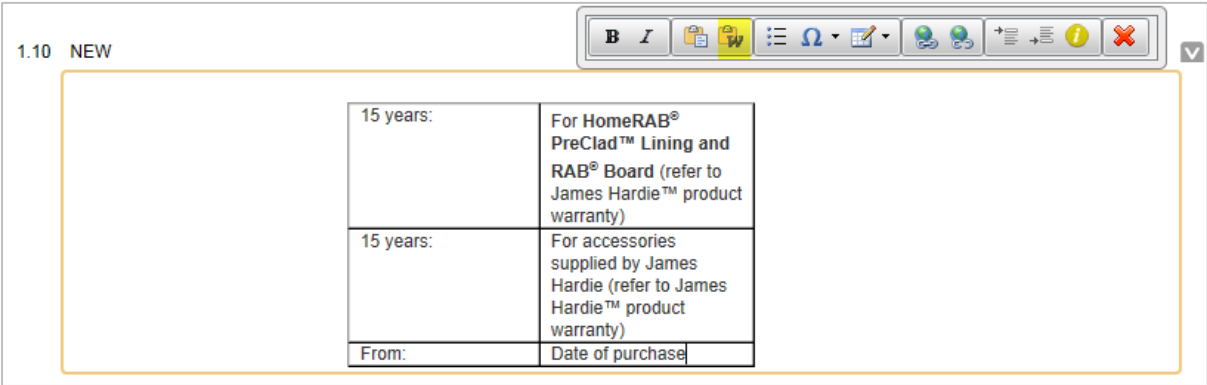
1.10 NEW



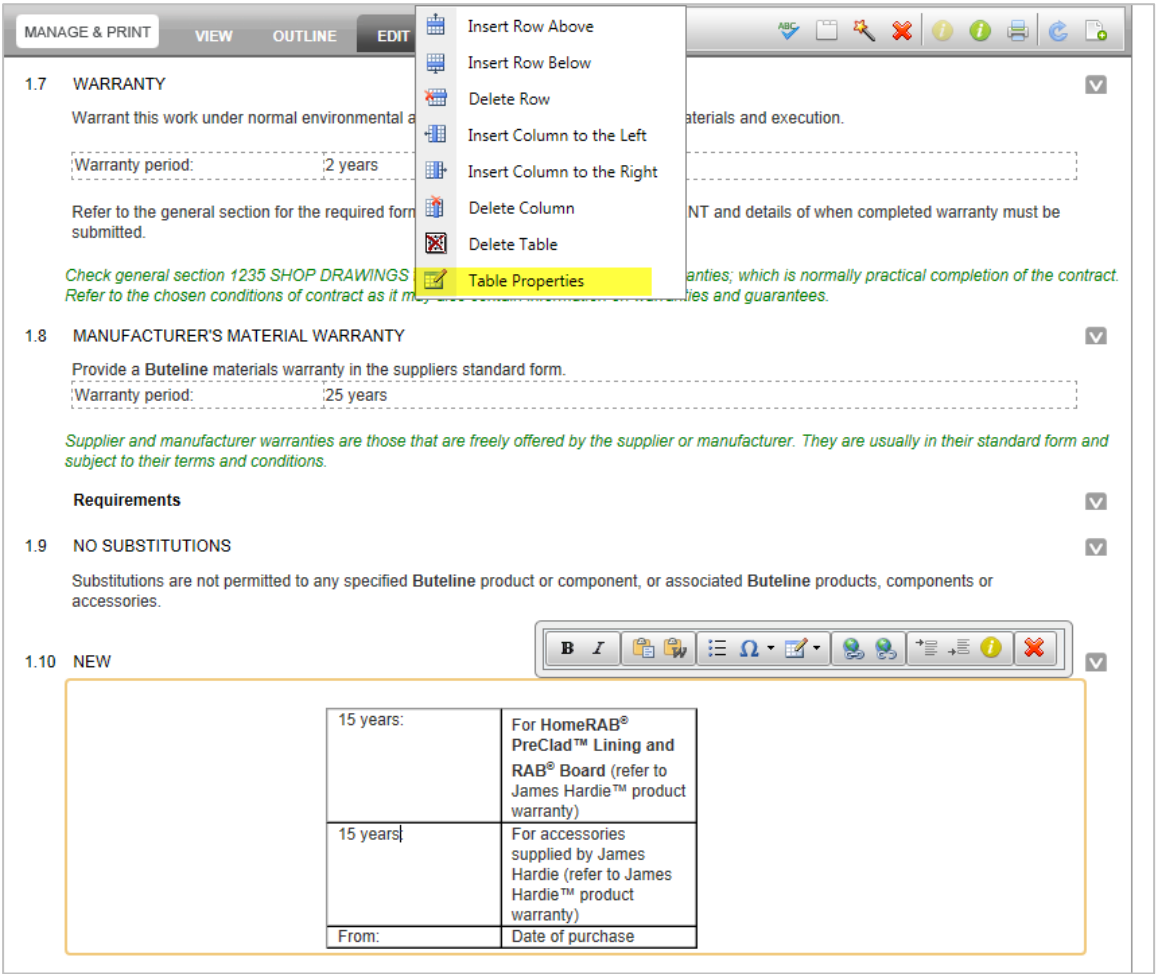


Click the Word paste icon on the tool bar – recognised by the W.

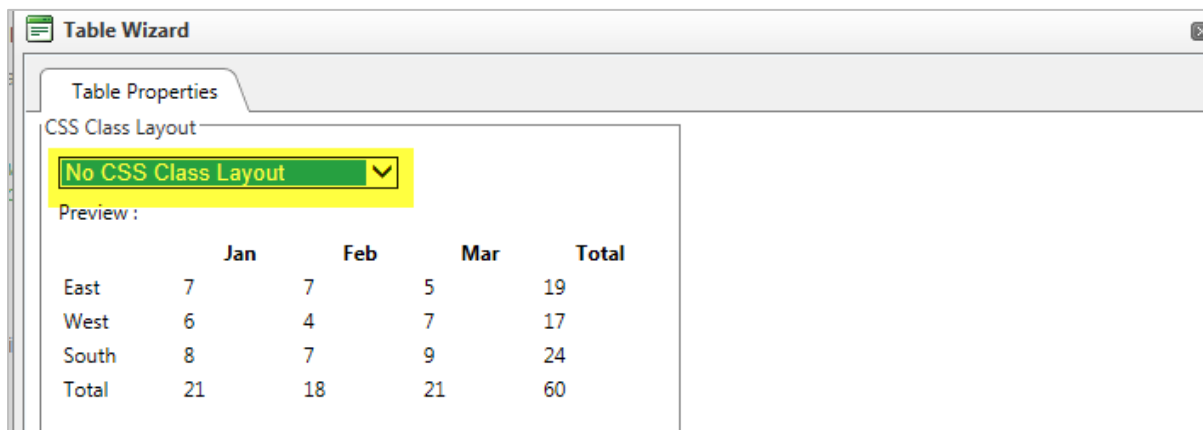
The table will be pasted directly into the text box ready for formatting for the specification.



Right click into the table. Select Table Properties.



8. From the Table Wizard, choose from the drop down, table no border or alternatively table with border. Click OK.



9. The document must Save at this point. Once that has been done, you can then click the Refresh button on the top tool bar and it will reformat the table to left align.



10. Finish editing the table as you need. Copy and paste in your clause title. You are now finished and proceed to the next table.



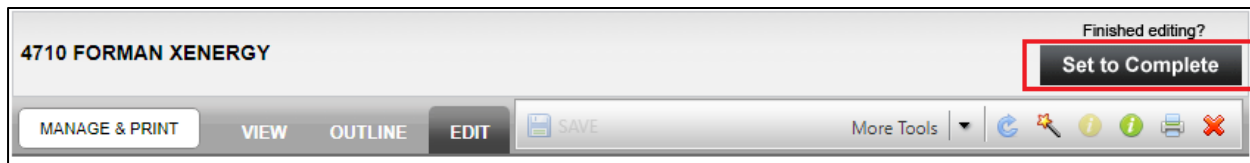
Tildes ~

A tilde ~ is a prompt in the Worksection that notes that the specifier needs to insert information. Ensure before your document goes to any third party such as a client, consultant or council that no section contains any tildes, which could leave the specification incomplete.

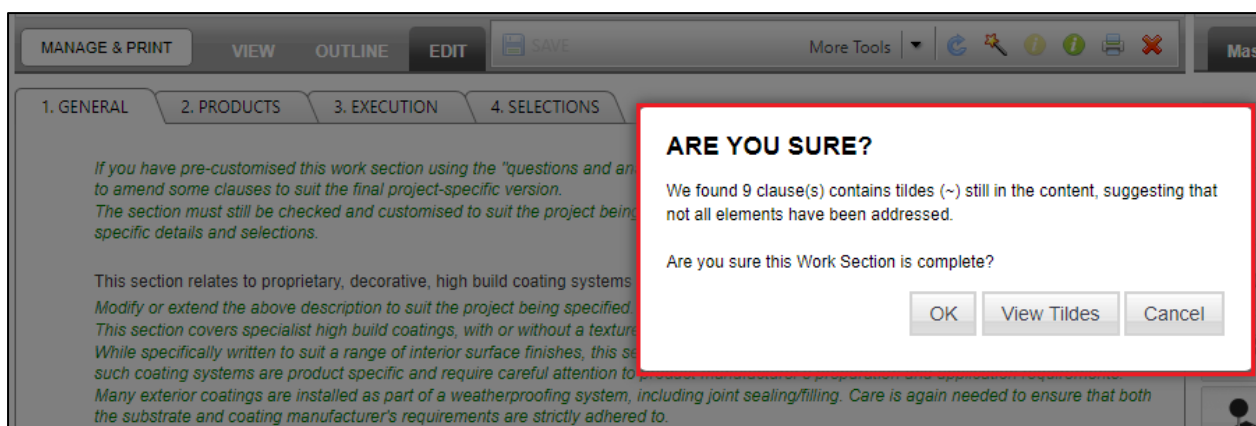
On **Setting a Worksection to Complete**, a warning sign will advise how many tildes in clauses remain. It is possible to override this warning though, it is likely that you only do this when **Creating an Office Master**.

Setting a Worksection to Complete

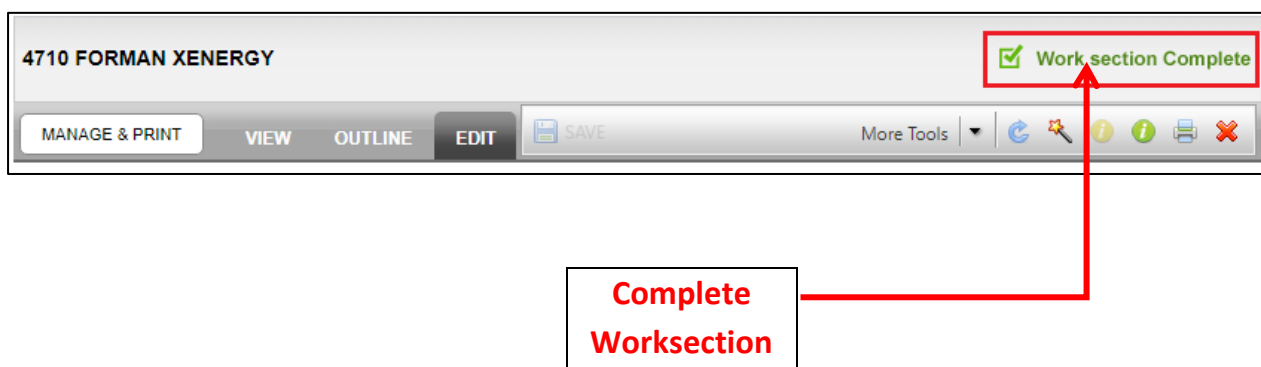
When you have finished editing your Worksection, set the Worksection to complete. This functions in conjunction with workflow, especially if there is more than one author. All sections need to be marked as complete to remove **Draft** from the cover document on printing.



1. To mark a Worksection to complete, click on the icon **Set to Complete** (above the tool bar).
2. If a pop up box comes up advising that there are some tildes left in a Worksection you have a choice to finish the document or ignore the warning. (See the **Tildes** section on the previous page for clarification).



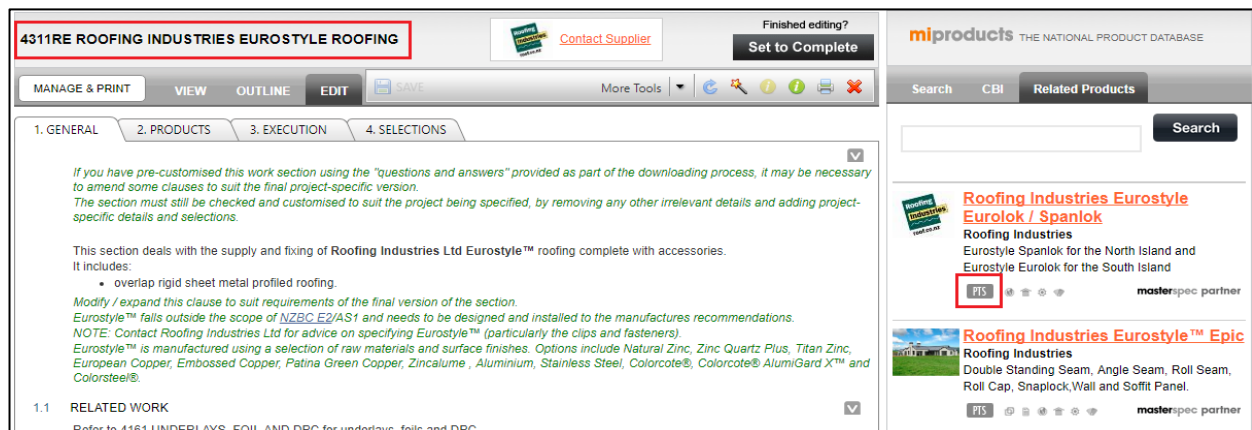
3. Once a Worksection is complete, the completed icon (green tick) on the top of the Worksection tool bar appears. In the work flow Worksection, you will also note that the section icon has been changed, helping you visually manage your Worksections.



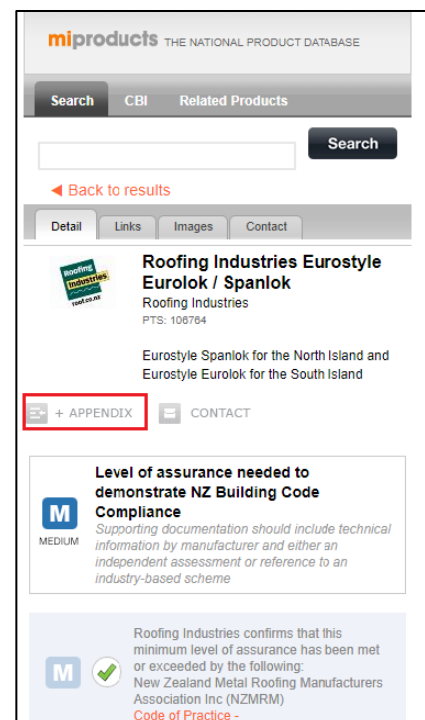
4: NATIONAL PRODUCT DATABASE INTEGRATION

Inserting Product Technical Statements into an Appendix

1. Branded sections are easily recognised with the alpha coding after the CBI numbering. The manufacturer may have a pre-written Product Technical Statement available (identified with a PTS icon). These are viewed under the Toggle button (on a laptop or small screen) or on a large screen, the miproducts database information column is visible (far right).



2. Clicking on the listing will allow you to view the product Technical Statement (PTS) that can be attached to the Manufacturers Info (Manuf Info) section at the back of the specification.
3. **To attach the PTS** simply click the Appendix icon. A menu will advise it is now attached to the document.
4. You can also view documentation from the manufacturer's website on the **Links tab**.
5. Images on the product, showing colours and patterns, are accessible from the **Images tab**.
6. **Note:** You can contact the manufacture for comment directly by using the contact icon in the miproducts panel. (See page 38 for further information).
7. Selecting a Worksection automatically updates the miproducts relevant products depending on the section you are in.



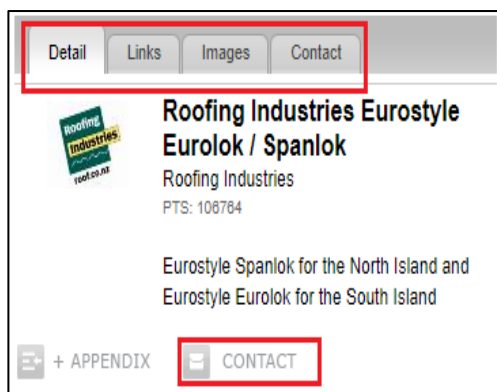
NOTES:

When using to contact manufacturer, you can elect to attach the current section you have open. This will help the manufacturer to make suggestions or changes.

The Contact Tab in a PTS

The Contact button next to the appendix, allows the specifier to contact the supplier by sending an email direct to the supplier. By clicking or unclicking the tick box **“As a PDF Attachment”** will allow the supplier to view a pdf of the custom specification from you.

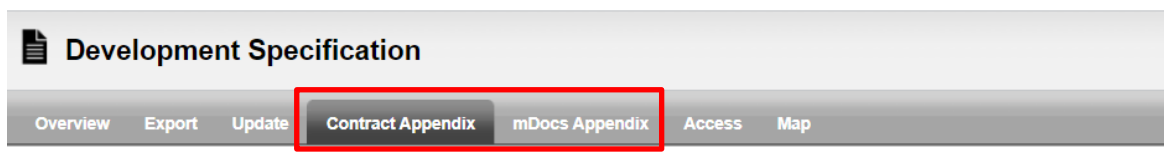
The Query should detail the type of information / detail you wish to know from the supplier i.e. review my specification or contact me with additional details. When you submit the request, any email will go directly to your email address (your login). Note that manufacturers do not see your email address or details.



The screenshot shows the 'Contact Supplier' form. The form is titled 'Contact Supplier' and shows the supplier 'Roofing Industries'. It includes fields for 'Send To', 'Send From', and 'Email Content'. The 'Email Content' section has a 'PDF' icon and a text area. The 'Enquiry Details' section has checkboxes for 'Review Work Section', 'Price request', 'Product availability or lead times', and 'Product Technical Statement (miproducts PTS)'. The 'Subject' field is filled with 'Request for Product Support'. The 'Query' field is empty. The 'Confirm' section has 'Submit Request' and 'Cancel' buttons.

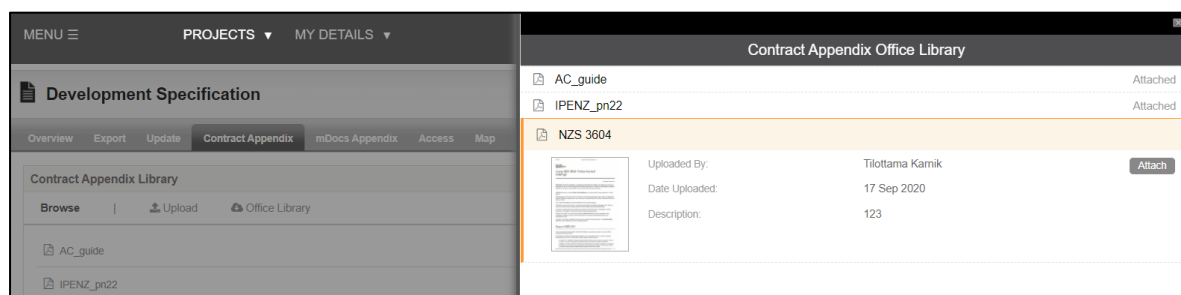
Managing the Document Upload Tool

The Specification Overview page lets you manage supporting documents for both the contract and the manufacturer information.

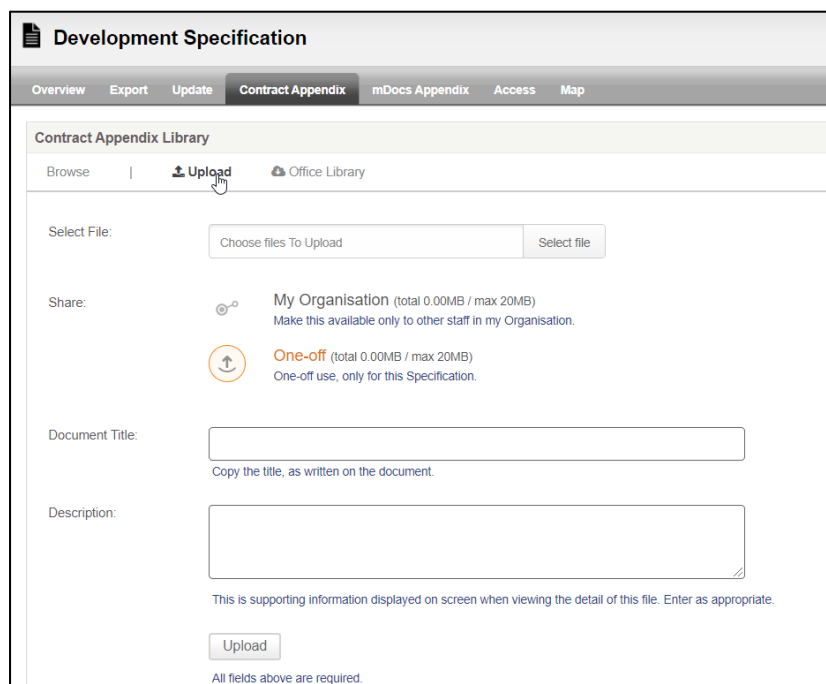


Managing the Contract Appendix

Contract Appendix Library allows you to upload any pdf document that is part of the construction contract. These typically include engineer calculations, fire or other expert documents that relate to this specific project construction details. Within Contract Appendix Library you can upload pdfs from your personal computer, or search through your Office Library.



When uploading documents to the Contract Appendix, you can decide to upload them to your Office library or use the document as a one-off. By uploading it to the Office Library, it means that the rest of your organisation will be able to preview the document and use it in future projects.



Managing the mDocs Appendix

mDocs Appendix tab on the Specification Overview page allows you to manage supporting manufacturer information regarding products you have included in your specification. Manufacturer information such as PTS or bracing manuals are of interest to Territorial Authorities but are not part of the contract documents. When documents are placed in the Manufacturers Technical Library tab, they print out as a separate stand-alone appendix to include for consent. Every work section will have a corresponding chapter index page, giving the reader a summary of the documents included and some basic contact information for the manufacturers work section you have included. Every pdf is also bookmarked for ease of use.

Referenced Technical Documents	
Browse Upload	
1232S1 Explanation of Schedule Sections	0
1237 Warranties	0
1237S1 Schedule of Warranties	0
4221AV Abodo Vertical Cladding System	6
4231HE James Hardie® EasyLap™ Panel Cladding	10
EasyLap Panel Care and Maintenance	✕
EasyLap Panel Product Warranty	✕
4311RE Roofing Industries Eurostyle Epic Roofing	10
Roofing Industries Eurostyle Eurolok / Spanlok 106764	mi
Roofing Industries Eurostyle™ Epic 101516	mi
Roofing Industries Maintenance for Metal Roofing and Cladding	✕

There are three ways to load the documents; see **pg 46 Inserting PTS into an Appendix** for the first option. The second option is to upload and select any pdf from within your personal computer. The third option is to use the pre-loaded technical documents from the Manufacturers library.

To use option three, using the pre-loaded documents, simply select the work section you would like technical documentation loaded against. If there are pre-loaded documents from the supplier, you will notice a number to the right-hand side of the branded work sections title.

When you select the document title more information will be displayed regarding the content. Along with a title and description, the information will be the following; where the document was sourced, the supplier, miproducts or your organisation. You'll also see the purpose of the document related to performance, maintenance, installation, warranty, or environmental. There is also the option of previewing the document, recommending it to the specifying computer with a simple 'thumbs up' or leaving a review.

To attach the document, select **Attach**.

Use the search functionality at the top of the window to search by keyword for brand. You can also filter by source and document purpose. If you require an additional document that is not yet

pre-loaded with the Manufacturer Technical Library, simply select **Request a Document**. This will open a new window where you can free type the title of the document and provide more information to the manufacturer of what you require. Selecting the purpose of the document within the checkboxes and then selecting **Submit** will send them an email notification. Alternatively, if you'd like to find the document on their website, simply select their logo at the bottom of the previous window.

mDocs Manufacturer's Technical Library

Filter by Keyword CLEAR Filter by Source ☐ OFF Filter by Purpose ☐ OFF

Enter Brand or Name

Tyvek® Pro-Roof and Wall Breathable R2: Self-Supporting Fire Retardant Syntheti...

Source: Supplier **Attach**

Purpose:

Description:

Date Uploaded: 13 Aug 2020

Referenced: 0

Document ID: 10626

Review: [0 review](#)

1

Flashing Tape

FlexWrap™ NF

Supro (2506B) & Supro Plus Breathable R2: Self-Supporting Fire Retardant Synth...

Tyvek® HomeWrap Breathable, Fire Retardant, Synthetic Wall Underlay

Request a Document [Terms](#) **Finish**

[View our website for more technical detail](#)

Once you have attached all appropriate technical documentation there will be no need to manually sort the order, they will automatically be in CBI order.

Uploading PDF's into mDocs Appendix

To upload our own documents to mDocs Appendix, simply select the **Upload** option.

1. **Select File** will open a window allowing you to select your pdf document.
2. **Select the work section** within your specification that it relates to.
3. Select whether this will be a **one-off upload** or if you would like it stored in your **Office Library**.
4. Select the **purpose** of the document.
5. Fill in the **Document Title** and **Description**.
6. Selecting **upload** will complete the process.

Uploading PDF's into the Contract Appendix

To upload our own documents to Contract Appendix , simply select the **Upload** option.

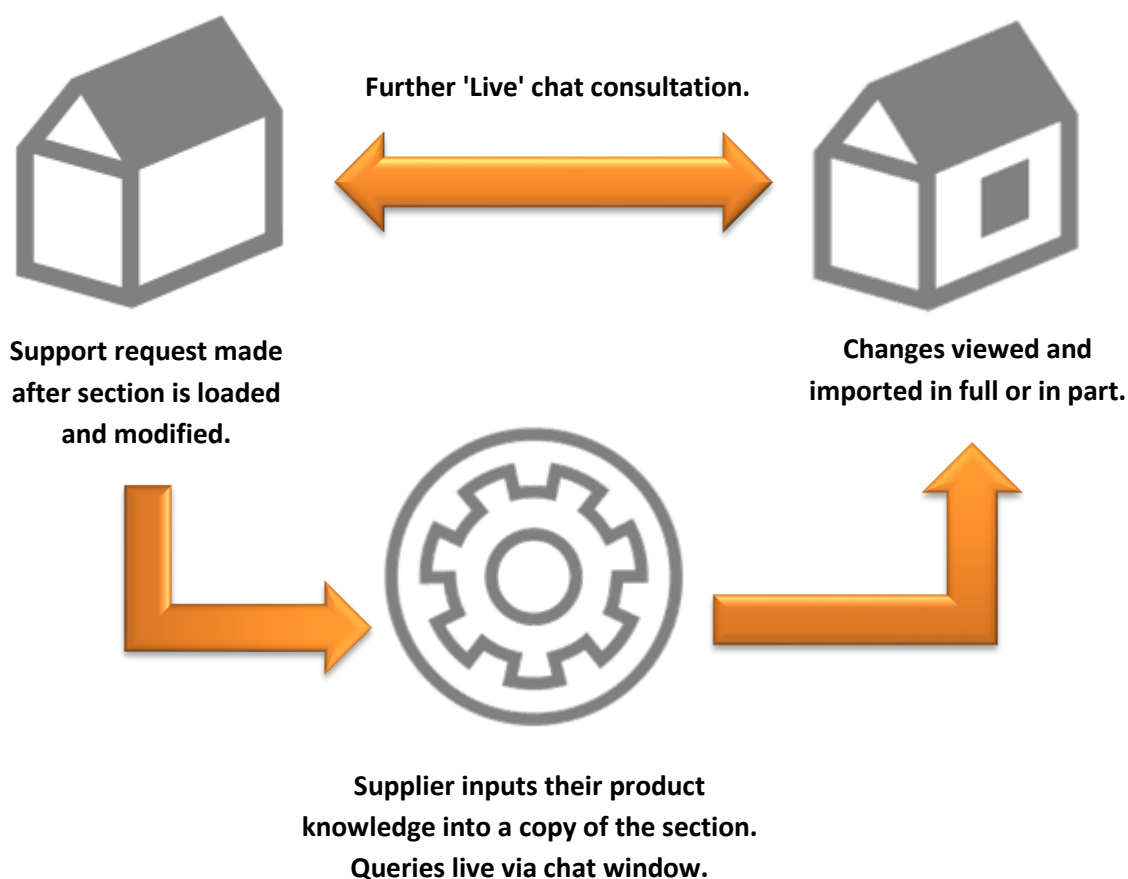
1. **Select File** will open a window allowing you to select your pdf document.
2. Select whether this will be a **one-off upload** or if you would like it stored in your **Office Library**.
3. Fill in the **Document Title** and **Description**.
4. Selecting **upload** will complete the process.

5: WORK SECTION SUPPORT

Introduction

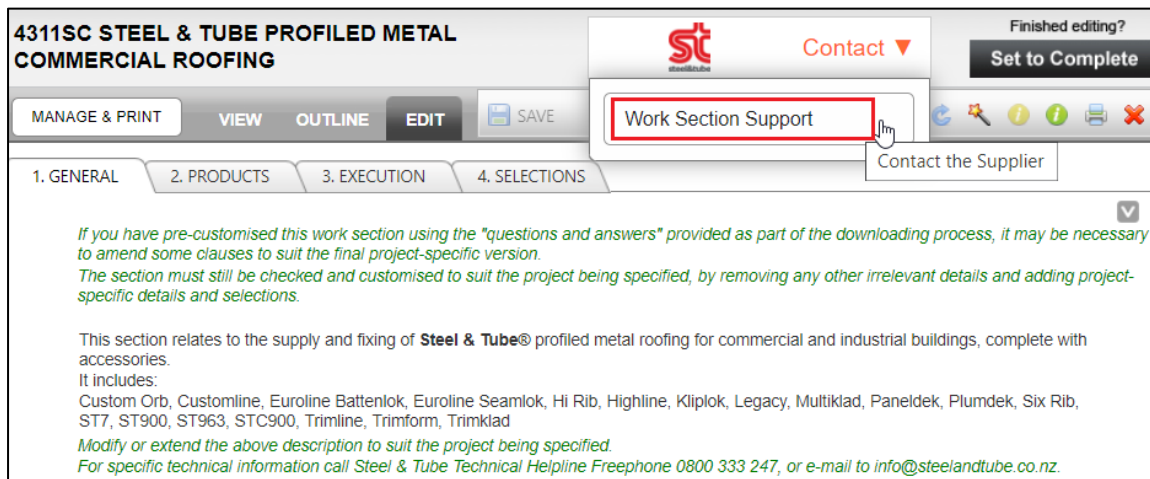
While working within your branded work section, you as the designer have the option of selecting a contact icon, which then requests the supplier's assistance.

This icon gives you three request options: replace, edit or comment. This will not only assist you in specifying the product correctly but will also ensure their specification is accurate by getting project specific information from a specialist on the product you're using.



Contacting the Supplier

1. To begin your request while writing within a branded work section, select the **Contact** button directly above the specification content.
2. Select **Work Section Support**.



Once the Work Section Support icon has been selected, the Contact Supplier window will display. ***Note that the support level, replace, edit and comment, options vary depending on what level or support the supplier decides to provide.**

You may then have the following options:

REPLACE - The Supplier will write a replacement Work Section based on the information you supply. You will be able to preview the suppliers suggestions and then import the full work section into your project. You can then continue editing as per usual.

EDIT - The Supplier will edit a copy of your work section. You can view the returned information and choose to include or exclude the content on a clause by clause basis.

COMMENT - The Supplier will add comments to clauses of your work section. They cannot edit any of the content, but can make comments on the content. You will be able to review their comments then make any changes you want to make with the regular edit function.

Choose which level of support you'd like by selecting the circle icon.

Contact Supplier

Contact Steel & Tube

From: Anjeeta Narayan, Treehouse @ Arkitects

Subject: Support with writing a Work Section

4241S Steel & Tube profiled metal wall cladding

What support would you like with this Work Section?

Choose from the options offered by this Supplier.

REPLACE

The Supplier will write a replacement Work Section.
You will be able to preview then import that, fully replacing your current Work Section.

EDIT

The Supplier will edit a cloned copy of your Work Section.
You will be able to review and selectively adopt changes at Clause level.

COMMENT

The Supplier will append comments to clauses in a cloned copy of your Work Section.
You will be able to review their comments.

Project profile:

Multi Unit Low R

Corrosion Zone

Project Value

Wind Zone

Earthquake Zone

Additional information or questions for Supplier:

Select request location:

Primary contact

(Select the most appropriate)

Submit Request

Cancel

REPLACE

The Supplier will write a replacement Work Section.
You will be able to preview then import that, fully replacing your current Work Section.

EDIT

The Supplier will edit a cloned copy of your Work Section.
You will be able to review and selectively adopt changes at Clause level.

COMMENT

The Supplier will append comments to clauses in a cloned copy of your Work Section.
You will be able to review their comments.

To send the request, enter in the following information to assist the supplier in understanding the requirements of your request.

Page | 53

Project profile:

Multi Unit Low R ▼ Corrosion Zone ▼ Project Value ▼ Wind Zone ▼ Earthquake Zone ▼

Additional information or questions for Supplier:

Select request location:

Primary contact ▼ (Select the most appropriate)

Submit Request Cancel

1. **Project Profile:** Select the appropriate building function that best represent your project. This includes the basic project parameters pertaining to wind zone, corrosion zone, earthquake zone and total established project value.
2. **Additional Information or Questions for the Supplier:** You may choose to provide additional information that is pertinent or helpful to the supplier when specifying. You can use this like the text function on your phone to clarify or ask the supplier a question.
3. Select **Submit Request** on completion. From here, a chat window will automatically populate on your screen linking you with the supplier.

Your request has now sent an email to the supplier asking them to respond to your request.

Managing your Work Section Support Request

Here are a few workflow tips before you get started with the Work Section Support function.

Cancelling Your Request.

When you request assistance on your work section, the section will freeze the editing functions to allow the supplier to respond. If you want to continue editing the section, simply select Cancel Request.

You will now be able to continue editing and then resubmit your request if you so choose with updated content. This means you always have the control of the section.

To take back control, simply select **Cancel Request**.

Contact Supplier - COMMENT on Work Section Manage Request

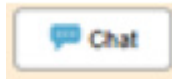
Steel & Tube has not yet reviewed your request.

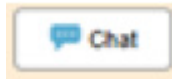

Cancel Request

Disclaimer Contact History

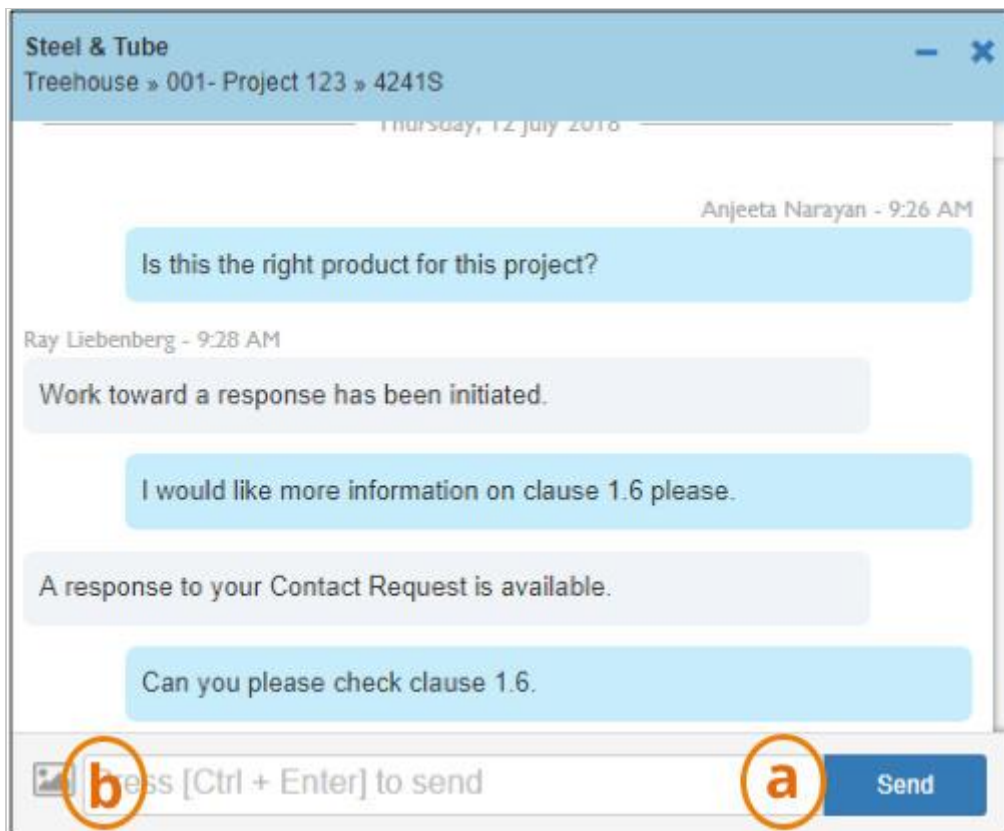
The Chat Window

You are able to communicate with the supplier via the chat window. The chat window is live in real time much like the text function on your phone.




- If the Chat Window is closed, select the  icon above your work section to activate the window at any time.
- Type your question or response and then simply select **Send (a)**.
- Once the supplier replies, their response will be in grey.
- You also have the ability to send images if this helps to clarify your query.
- Select the image icon  on the left hand side. Upload any image file (jpeg, png) and then click **Select (b)**.
- You can minimise or close the chat window with the icon on the top right of the window.

Your request has now sent an email to the supplier asking them to respond to your request.



Notifications

When a supplier is finished with your request or has changed the status, you will be notified in 2 different ways.

1. A partner icon that flashes in the index 
2. With a message icon on the top of your Masterspec screen next to your name and login details.

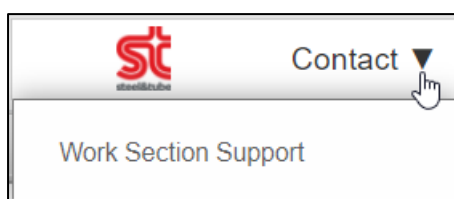
Replacing your work section

Replacing a work section means that, with your request the supplier will write a full work section based on the project details you have supplied.

This means they can do a full Q&A and edit any part of the section. They can then send the changes back to you for your review. You can import any information that you decide adds value to your specification. Alternatively, you can disregard it and continue with your existing work section.


The Replace function will allow you to receive expert product knowledge straight from the supplier.

To begin, select the **Contact** button on top of your branded work section.

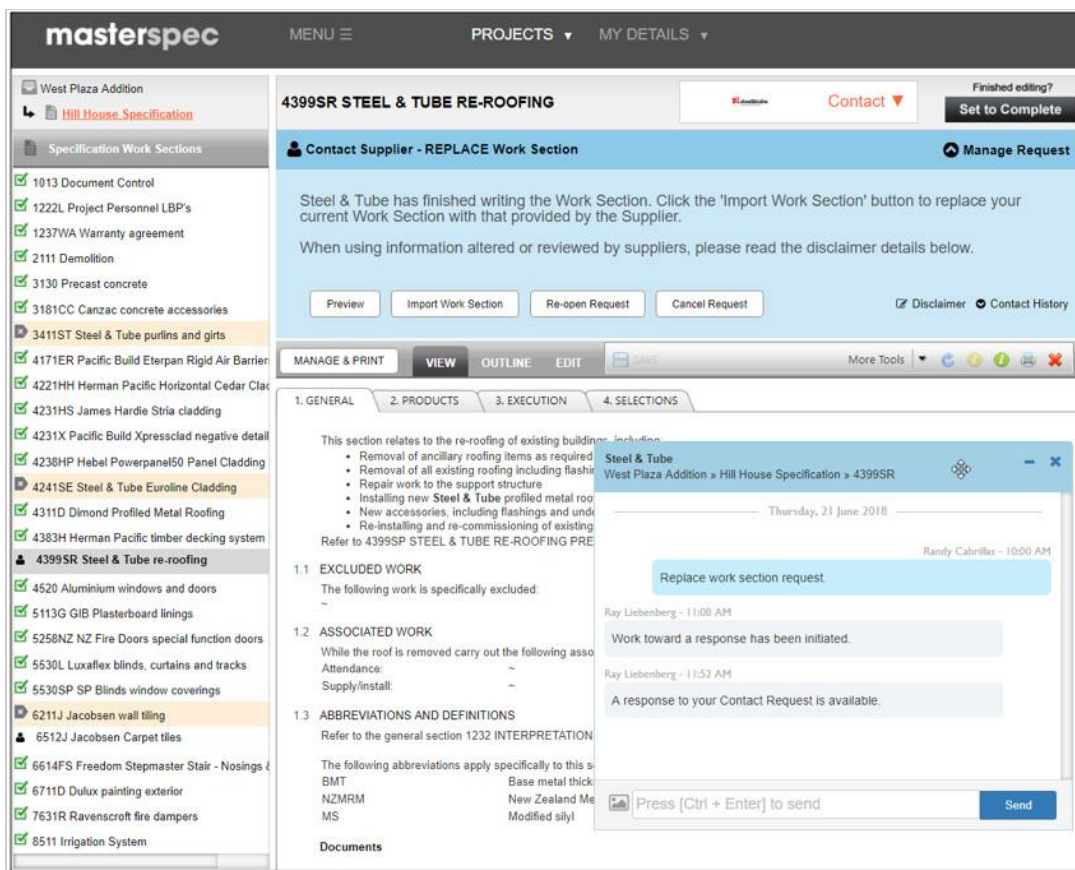


1. Select the **Replace** icon.
2. **Project Profile:** Select the appropriate building function that best represent your project. This includes the basic project parameters pertaining to wind zone, corrosion zone, earthquake zone and total established project value.
3. **Additional Information or Questions for the Supplier:** You may choose to provide additional information that is pertinent or helpful to the supplier when specifying. You can use this like the text function on your phone to clarify or ask the supplier a question.
4. Select **Submit Request** on completion. From here, a chat window will automatically populate on your screen linking you with the supplier.
5. The status of your work section in the blue panel will read "**not yet reviewed**". Once the supplier starts editing your request, the work section will read "**initiated working on a response at time and date**" in the blue status.

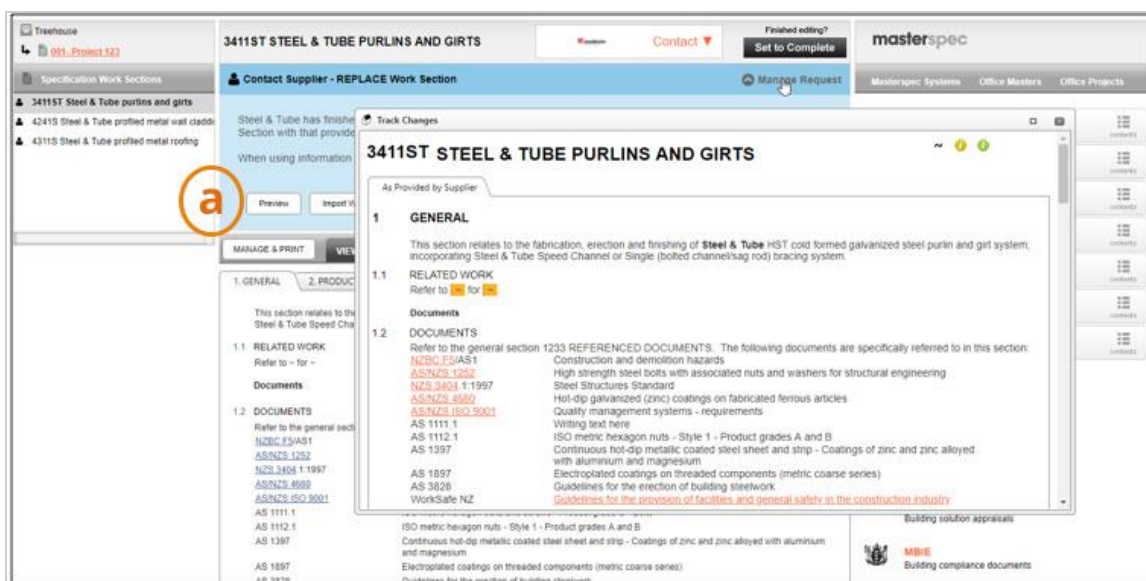
When the supplier has finished writing the work section, you will be notified in the following ways

- A supplier icon that flashes in the index 
- With a message icon on the top of your Masterspec screen next to your name and login details.

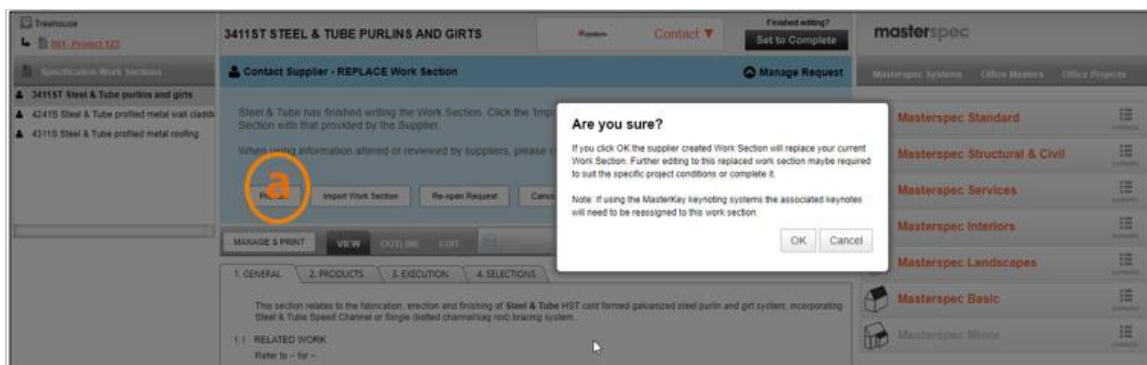
There will now be more functions available in the action panel to review or import the content.



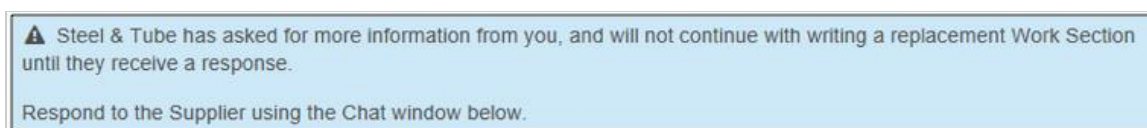
6. Select **Preview**. This will allow you preview the work section that the supplier has written (a).



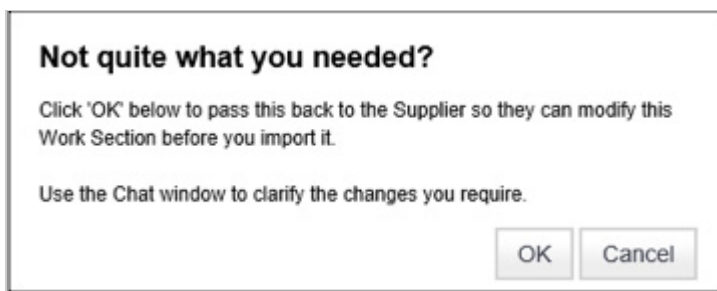
7. Exit the preview screen by selecting the close (x) or minimise (-) icon. Then, if you believe the content meets the project's needs, select **Import Work Section**. Select **OK** to import the work section (b).



***Note.** If the supplier requests more information upon reviewing your request, you will be notified with the below message. Find and respond to their query in the chat window.



In the case that you need more information, or project circumstances have changed, select **Re-open Response**. Selecting OK will notify the supplier. Then use the chat window to clarify the issue.

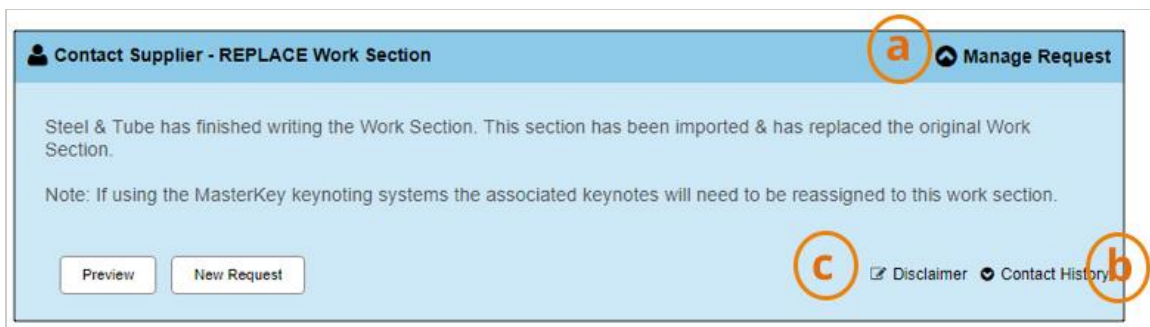


Selecting **Manage Request (a)**, will give you the option of **Previewing** the original work section. Or select **New Request** to bring up the original request window, from here you can begin a new request by selecting replace, edit or comment.

Selecting **Manage Request (a)** on any section that has had input from a supplier will allow you to review the original content as it was sent. Notice on the **Legal Disclaimer (b)** and **Contact History (c)**.

Contact History will provide a history of all actions between the supplier and yourself and versions of the section provided.

The disclaimer confirms that Suppliers will not be aware of all the projects circumstances and conditions, they are providing content to you with limited project details. **You must use your professional judgement** to access the content, check it's validity, and then decide if you want to include this content as your own. You have full editing rights and the ability to change any of the content from the suppliers after you have imported it into your specification.

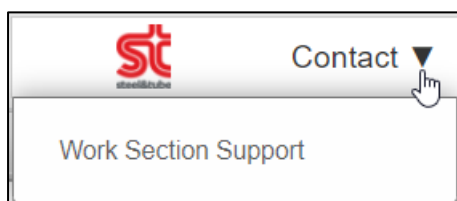


Editing your work section

Editing a work section means the supplier can assist you by modifying content, deleting or adding clauses within the work section you have supplied.

This allows for early supplier engagement and allows them to lend their expert knowledge to your project.

To begin, select the **Contact** button on the top of your branded work section.



1. Select the **Edit** icon.
2. **Project Profile:** Select the appropriate building function that best represent your project. This includes the basic project parameters pertaining to wind zone, corrosion zone, earthquake zone and total established project value.
3. **Additional Information or Questions for the Supplier:** You may choose to provide additional information that is pertinent or helpful to the supplier when specifying. You can use this like the text function on your phone to clarify or ask the supplier a question.
4. Select **Submit Request** on completion. From here, a chat window will automatically populate on your screen linking you with the supplier.
5. The status of your work section in the blue panel will read "**not yet reviewed**". Once the supplier starts editing your request, the work section will read "**initiated working on a response at time and date**" in the blue status.

Contact Supplier

Contact Steel & Tube

From: Anjeeta Narayan, Treehouse @ Arkitects
Subject: Support with writing a Work Section

4241S Steel & Tube profiled metal wall cladding

What support would you like with this Work Section?
Choose from the options offered by this Supplier.

- REPLACE**
The Supplier will write a replacement Work Section.
You will be able to preview then import that, fully replacing your current Work Section.
- EDIT**
The Supplier will edit a cloned copy of your Work Section.
You will be able to review and selectively adopt changes at Clause level.
- COMMENT**
The Supplier will append comments to clauses in a cloned copy of your Work Section.
You will be able to review their comments.

Project profile:

Multi Unit Low R ▼ Corrosion Zone ▼ Project Value ▼ Wind Zone ▼ Earthquake Zone ▼


Additional information or questions for Supplier:

Select request location:

Primary contact ▼ (Select the most appropriate)

Submit Request Cancel

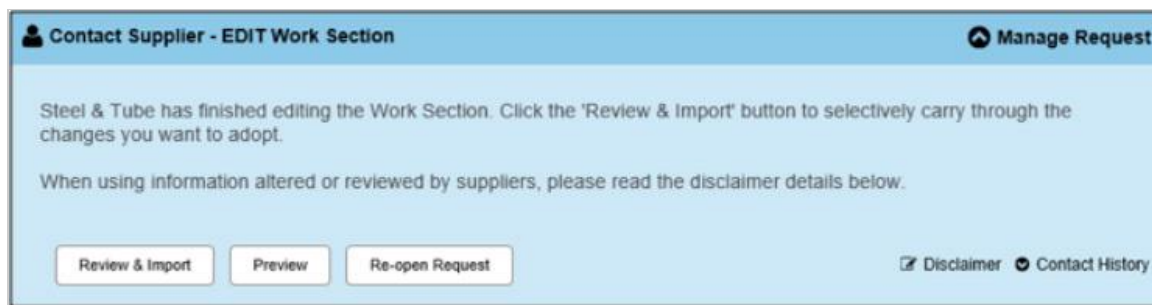
When the supplier has finished writing the work section, you will be notified in the following ways

- A partner icon that flashes in the index

- With a message icon on the top of your Masterspec screen next to your name and login details.

There will now be more functions available in the action panel to review or import the content.

The **Preview** button allows you to see the supplier section content without importing it. The re-open request allows you to resend the request without importing it.

Select **Review & Import**.



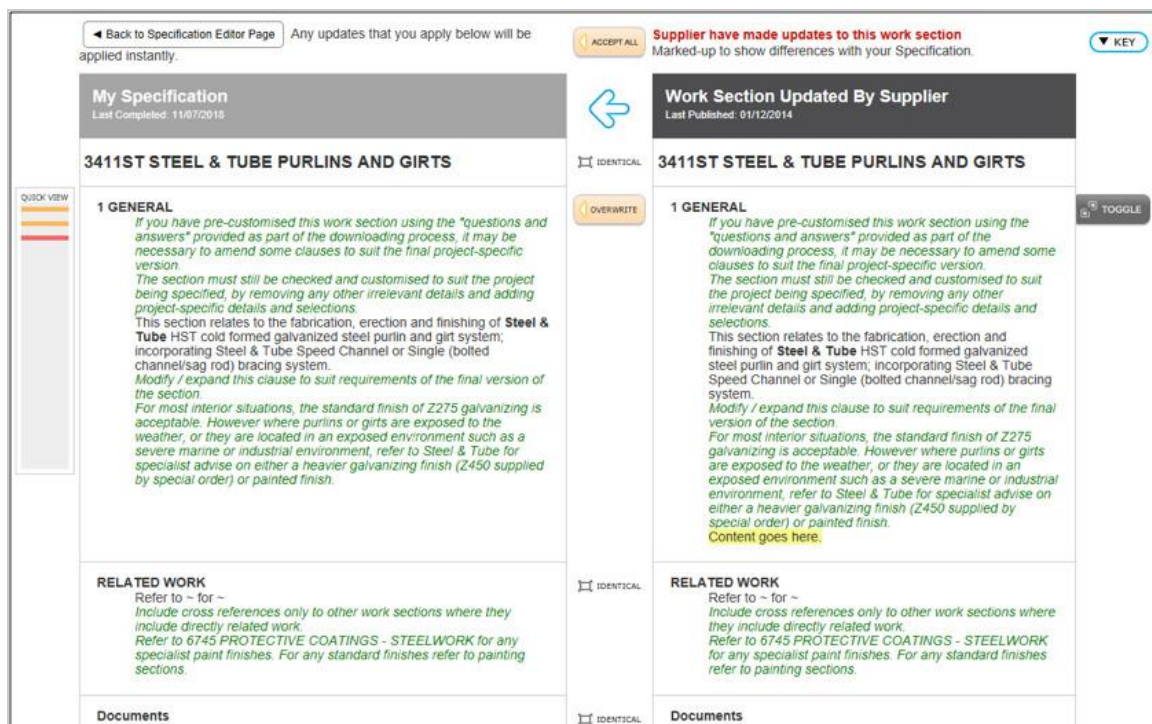
You will now be able to see your ORIGINAL work section on the left hand side, and the Suppliers edited work section on the right hand side.

You can find the changes by selecting the yellow (new clauses), orange (altered clauses), or red line (removed clauses) on the LEFT hand side located under QUICK VIEW.

In the centre of the sections, select the following buttons to apply the suggested changes to your section. You can select none, some, or all of the suggested changes.

- **Accept all** - will accept all changes and load them into your original work section.
- **Overwrite** - will replace your text with the new text (highlighted in yellow)
- **Delete Clause** - will remove the clause completely out of the original work section
- **Insert Clause** - will add the new clause into the original work section

Once you have completed these actions, select **Back to Specification** Editor Page.



You will then be prompted by the 'Are you fully done?' window. Select Finished if completed, or Work in Progress if you'd like to continue to review the content or finish it at a later time.

Are you fully done?

Have you finished working with the information provided by the Supplier?

Note. Clicking 'Finished' will prevent this merge tool from being run again.

If you have selected Finished, you will return back to the work section. Here you can select Preview the changes as suggested by the supplier or select New Request under Manage Request. (a)

****Note.** You can continue to edit the content of the section at any point in the future as the project information changes.

Selecting **Manage Request (a)** on any section that has had input from a supplier will allow you to review the original content as it was sent. Notice on the legal **Disclaimer (b)**, and Contact **History (c)**.

Contact history will provide a history of all actions between the supplier and yourself and versions of the section provided.

The disclaimer confirms that suppliers will not be aware of all the projects circumstances and conditions, they are providing content to you with limited project details. **You must use your professional judgement to access the content, check it's validity, and then decide if you want to include this content as your own.** You have full editing rights and the ability to change any of the content from the suppliers after you have imported it into your specification.

Commenting on your work section

Commenting on a work section means that the supplier has the ability to comment on your section, but cannot alter or edit any of its contents.

Unlike edit mode, or replace, this means you cannot use the update manager to include content automatically into your specification. This can be done manually with copy and paste but might prove to be time consuming if there are a lot of changes.

Commenting is a great way to receive suggestions or information on how to best use the system making your project more project specific and accurate.

To begin, select the Contact button directly above your branded work section.



1. Select the **Comment** icon.
2. **Project Profile:** Select the appropriate building function that best represent your project. This includes the basic project parameters pertaining to wind zone, corrosion zone, earthquake zone and total established project value.
3. **Additional Information or Questions for the Supplier:** You may choose to provide additional information that is pertinent or helpful to the supplier when specifying. You can use this like the text function on your phone to clarify or ask the supplier a question.
4. Select **Submit Request** on completion. From here, a chat window will automatically populate on your screen linking you with the supplier.
5. The status of your work section in the blue panel will read "**not yet reviewed**". Once the supplier starts editing your request, the work section will read "**initiated working on a response at time and date**" in the blue status.

Contact Supplier

Contact Steel & Tube

From: Anjeeta Narayan, Treehouse @ Arkitects
Subject: Support with writing a Work Section

4241S Steel & Tube profiled metal wall cladding

What support would you like with this Work Section?
Choose from the options offered by this Supplier.

REPLACE
The Supplier will write a replacement Work Section.
You will be able to preview then import that, fully replacing your current Work Section.

EDIT
The Supplier will edit a cloned copy of your Work Section.
You will be able to review and selectively adopt changes at Clause level.


COMMENT
The Supplier will append comments to clauses in a cloned copy of your Work Section.
You will be able to review their comments.

Project profile:
Multi Unit Low R ▼ Corrosion Zone ▼ Project Value ▼ Wind Zone ▼ Earthquake Zone ▼

Additional information or questions for Supplier:

Select request location:
Primary contact ▼ (Select the most appropriate)

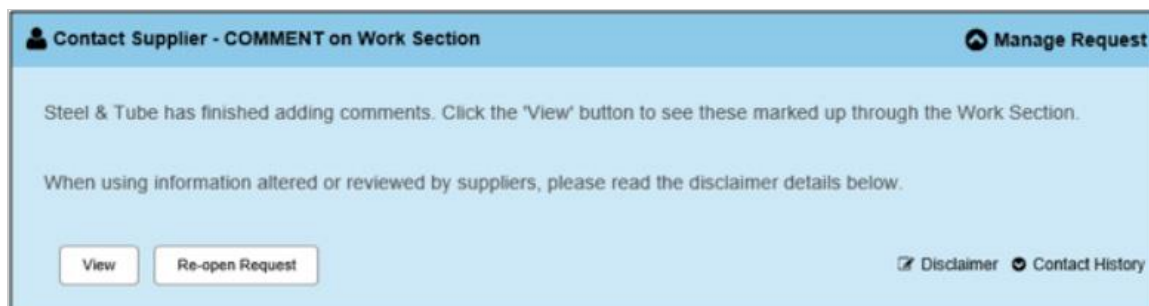
When the supplier has finished writing the work section, you will be notified in the following ways

- A partner icon that flashes in the index

- With a message icon on the top of your Masterspec screen next to your name and login details.

There will now be more functions available in the action panel to review or import the content.

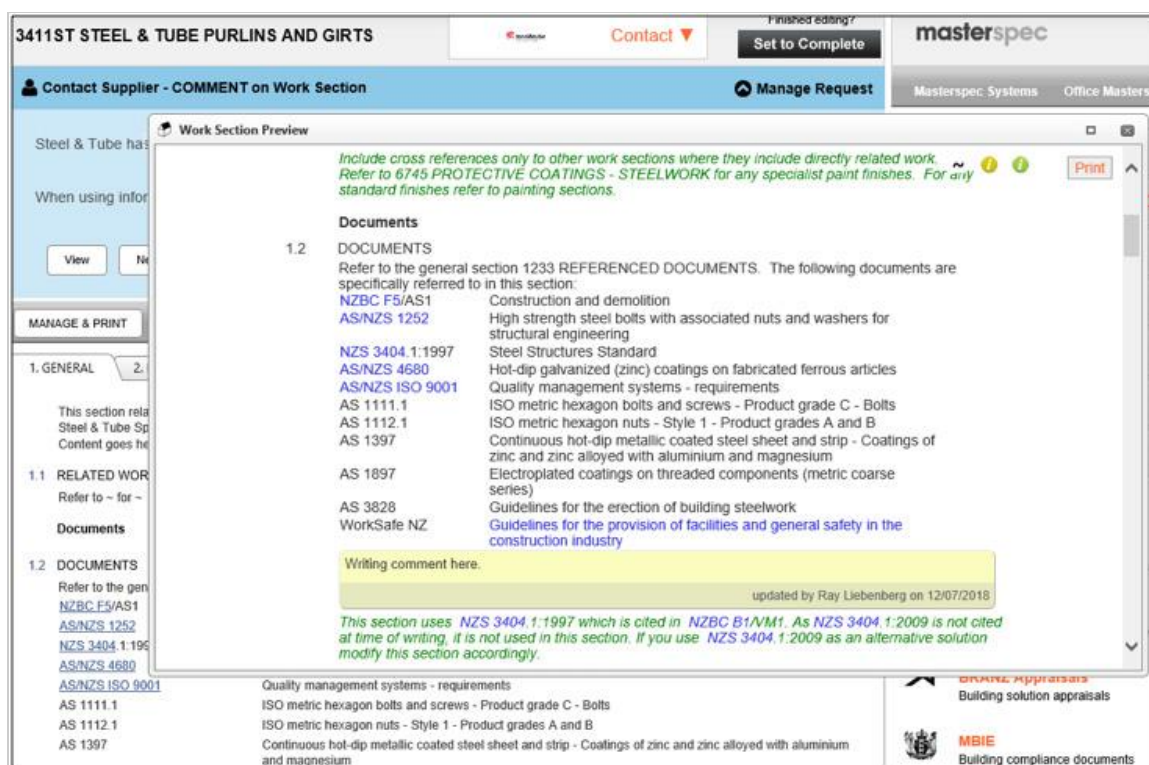
Selecting **View** enables you to view the suppliers comments, the author who commented and the time stamp. These will not print on your specification when exported.

Select **Review & Import**.



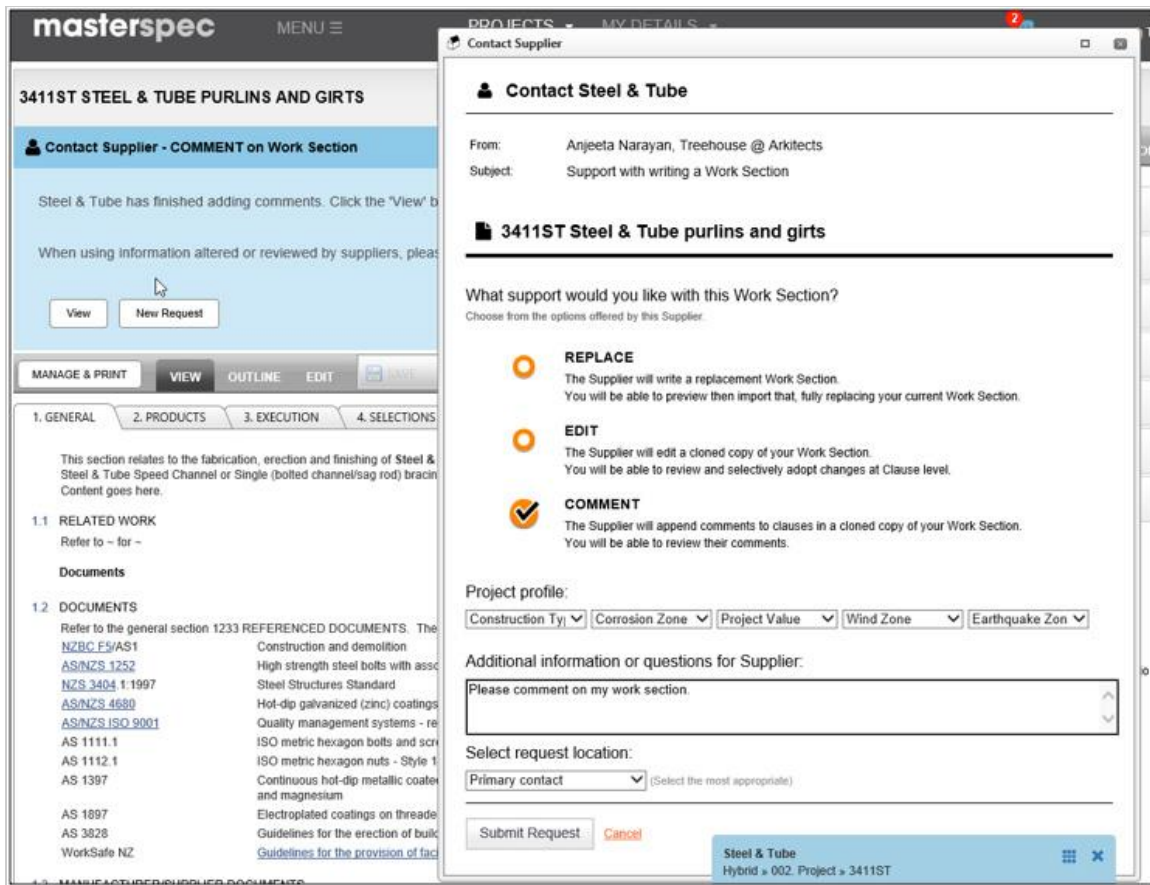
To copy the comments onto your specification, firstly ensure you're in edit mode. Right click and copy the comment text. At this time you can either drag the small window out of view, or select x to close it. Paste the comment under the required clause in your work section.

Once you have copied the required comments to your work section, close the window (x) on the top right hand corner.



You will now see the previous window, with selections of **View** and **New Request** on the top.

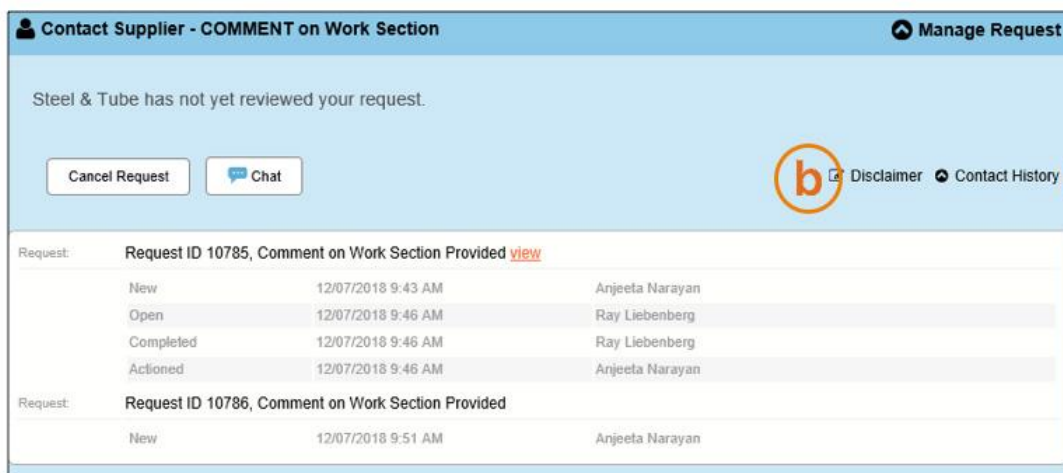
New Request enables you to advise the supplier that you need additional information and allows them to add additional comments to your work section. Write your comment in the text box under Additional information or questions for Supplier title and select Submit Request. Your question will populate in the chat window which the supplier can answer.



If you would like to review the comments made on the work section. Select **Contact History (a)** to display all correspondence. Select **View** to review all past comments within the work section.

DISCLAIMER: Please note the disclaimer for all design professionals. **(b)**

The disclaimer confirms that Suppliers will not be aware of all the projects circumstances and conditions, they are providing content to you with limited project details. You must use your professional judgement to access the content, check it's validity, and then decide if you want to include this content as your own. You have full editing rights and the ability to change any of the

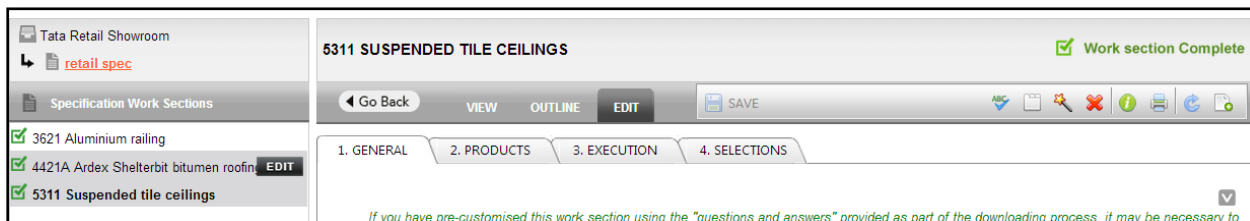


content from the suppliers after you have imported it into your specification.

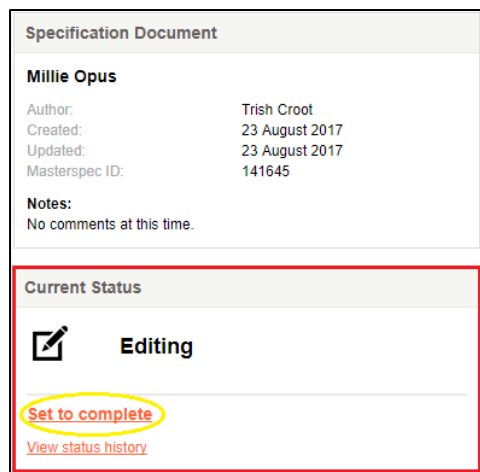
6: COMPLETING YOUR SPECIFICATION

Completing your specification

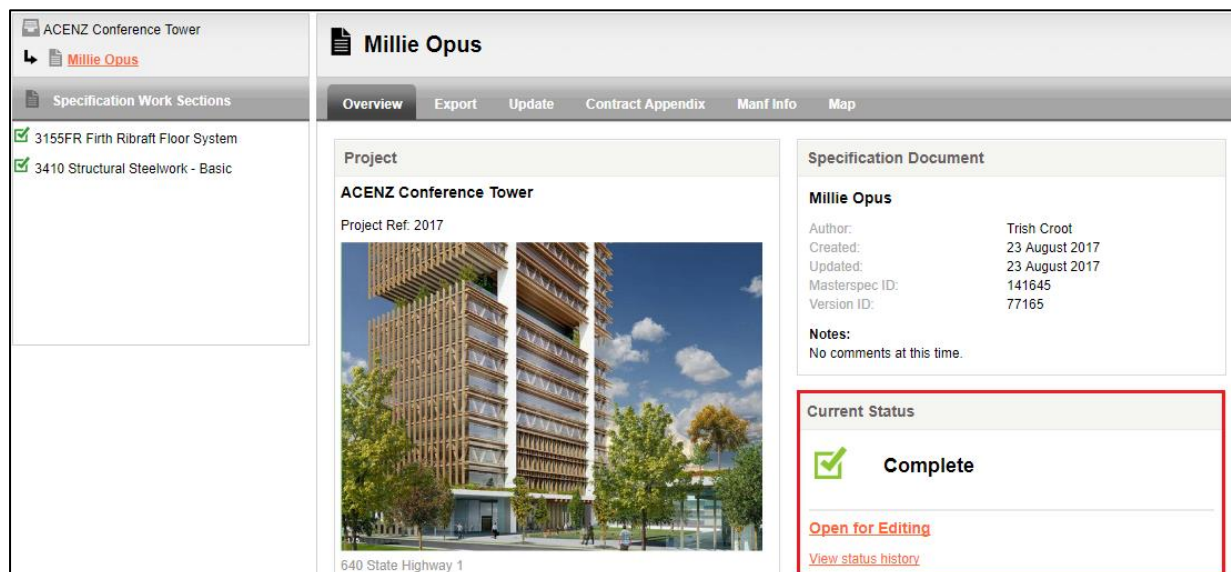
- Once all Worksections included have been edited and **Set to Complete**, you are able to set your specification as **Complete**. This stops others from editing or changing your specification inadvertently. It removes the "draft" note on the cover of the document.



- Go to the **Specification Overview** page and under **Current Status**, click on **Set to Complete**.



- You are able to **view status history** on the project by clicking on the button in the specification overview tab. This gives anyone editing the document to note and highlight any changes they have made for that particular document.



4. If at any stage you need to re-edit a section, click on the **open for editing** link then note text as to why you are editing or updating the document again. **It will be logged against your status history, however these notes will not print on the document.**

Specification status history				
Specification Document Status History				
Version ID	Opened for Editing	Set to Complete	Action Summary	Action By
10338	27/08/2013	03/09/2013	Information and notes on above project are printed on front page of specification.	Trish Croot
10385	03/09/2013		Go in and re-edit 5311	Trish Croot

Exporting / Printing your Specification

Remember that before you go to **export** your specification, there are a **couple of check list items for you.**

1. Have you set the document to complete? If it is not, the **DRAFT** logo will appear on the front page of the specification.
2. **Update** your project details to include relevant names, dates, addresses and notes as these all print out on the front sheet.
3. Make sure you have managed your Manufacturers Info and Contract Appendix sections and their documents are in the appropriate order.
4. Do you need any Export notes? These will appear on the cover page. (You could include version details, or customer name).

Interior Fitout - completed spec

Overview **Export** Update Contract Appendix Manf Info Map

Output Options

File Format: PDF

Content: Specification Document Only

Style: Compact

Work Sections: 17 of 17 Work Sections selected [change](#)

Highlighting: ☒ Hide all yellow text highlighting

Cover Sheet

Cover Sheet: Medium Image + Project Details

Print Header? ☒ [reload default header](#)

Document Header: Treehouse Architects

Export Notes:

These notes will appear on the cover page of your document.

5. You are now ready to export your specification as a **PDF** or **MS Word document**. Alternatively, you are able to view the document Online first.
6. Options for printing out your document are:
 - Specification Document only – includes all Worksections
 - Contract Appendix Only – uploaded contract information such as fire reports, PS1 and PS3's.
 - Full Specification & Contract Appendix – exports both documents together.
 - Manufacturers Information – all PDS and additional documents attached to the manufacturers info section manually.

- Specification - Part 4 Only – this is the SELECTIONS Tab only which can be used as a project schedule.

Interior Fitout - completed spec

Overview **Export** Update Contract Appendix Manf Info Map

Output Options

File Format: PDF

Content: Specification Document Only

Style: Specification Document Only

Work Sections: Specification - Part 4 Only

Highlighting: ☒ Hide all yellow text highlighting

Cover Sheet

Cover Sheet: Medium Image + Project Details

Print Header? ☒ reload default header

Document Header: Treehouse Architects

Export Notes:

These notes will appear on the cover page of your document.

Export Now

TIPS AND TRICKS!

NOTE: It is advisable to export and save your specification to your own server or hard drive at the milestone points of your project.

NOTE2: It is possible to Export into a Word document for editing further. The Masterspec Link tools can be switched on and used on any additional sections. Guidance notes cannot be viewed in previously downloaded sections. Any updates then made in word are NOT able to be imported back into NextGen2.

Print Specific Worksections

Nextgen2 is able to print specific Worksections rather than the complete document.

This is handy when sections have been revised and must be re-issued.

- Select the file format and content document type.
- On the EXPORT tab, click the **change** button.
- Select the Worksections that you would like printed.
- Select the cover sheet option, change your document header to reflect the details you would like printed on every page (especially useful for versioning), insert Export Notes if applicable, select **EXPORT**.

Overview **Export** Update Contract Appendix Manf Info Map

Output Options

File Format: PDF

Content: Specification Document Only

Work Sections: 29 of 29 Work Sections selected [change](#)

Cover Sheet

Cover Sheet: Default

Print Header? ☒ [reload default header](#)

Document Header: Treehouse Architects FURLONG Residential House 102164

Output Options

File Format: PDF

Content: Specification Document Only

Work Sections: 29 of 29 Work Sections selected [change](#)

- ☒ 1013 Document Control
- ☒ 1220 Project
- ☒ 1231 Contract
- ☒ 1232 Interpretation & definitions
- ☒ 1234 Documentation.
- ☒ 1237 Warranties
- ☒ 2221 Removing vegetation
- ☒ 2241 Excavation

Header Text

Customisable header text appears at the top of the page on all Worksection pages of the specification. (Not appearing on the title page or contents page).

- Under the project Export TAB, you will see Print Header. By default the header will be printed on the document. To NOT print it, untick the box.

- The default header comprises of;

- the practice name
- the project name
- the unique Masterspec ID
- 8pt text, aligned right (see image below)

- You are able to customise the text as required but not the standard output (alignment or font / size of font). To return to the default text, click reload default header at any point.

7: INTELLIGENT UPDATE MANAGER

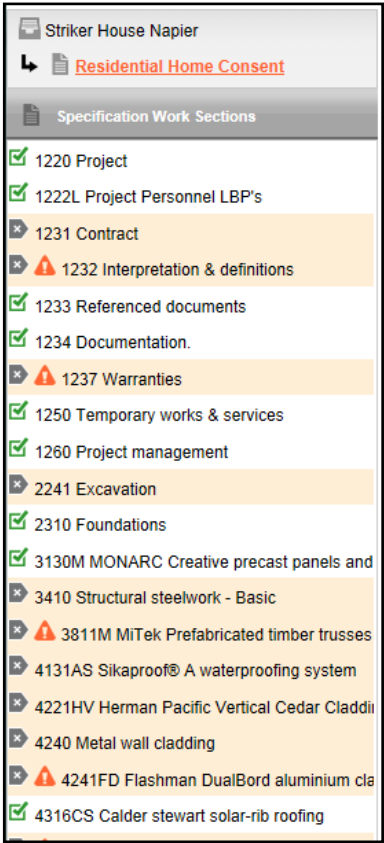
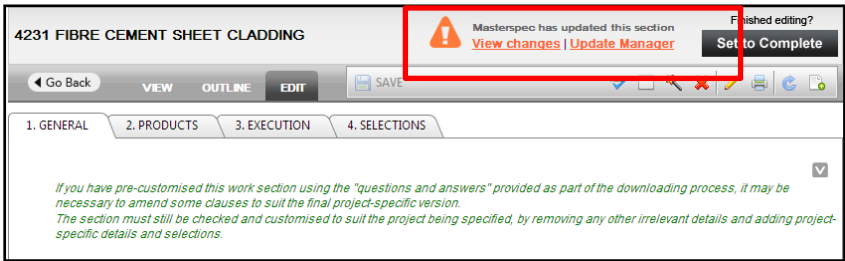
Recognising when a Worksection (or Office Master) is out of date

Out of date Worksections or Office Masters are easily recognised with the warning icon in the work flow area. It is an indication that Masterspec has updated the Worksections.

Only those users with Office Master Administrator permissions can maintain, alter or update Office Masters. A user is able to update a Worksection in their specification.

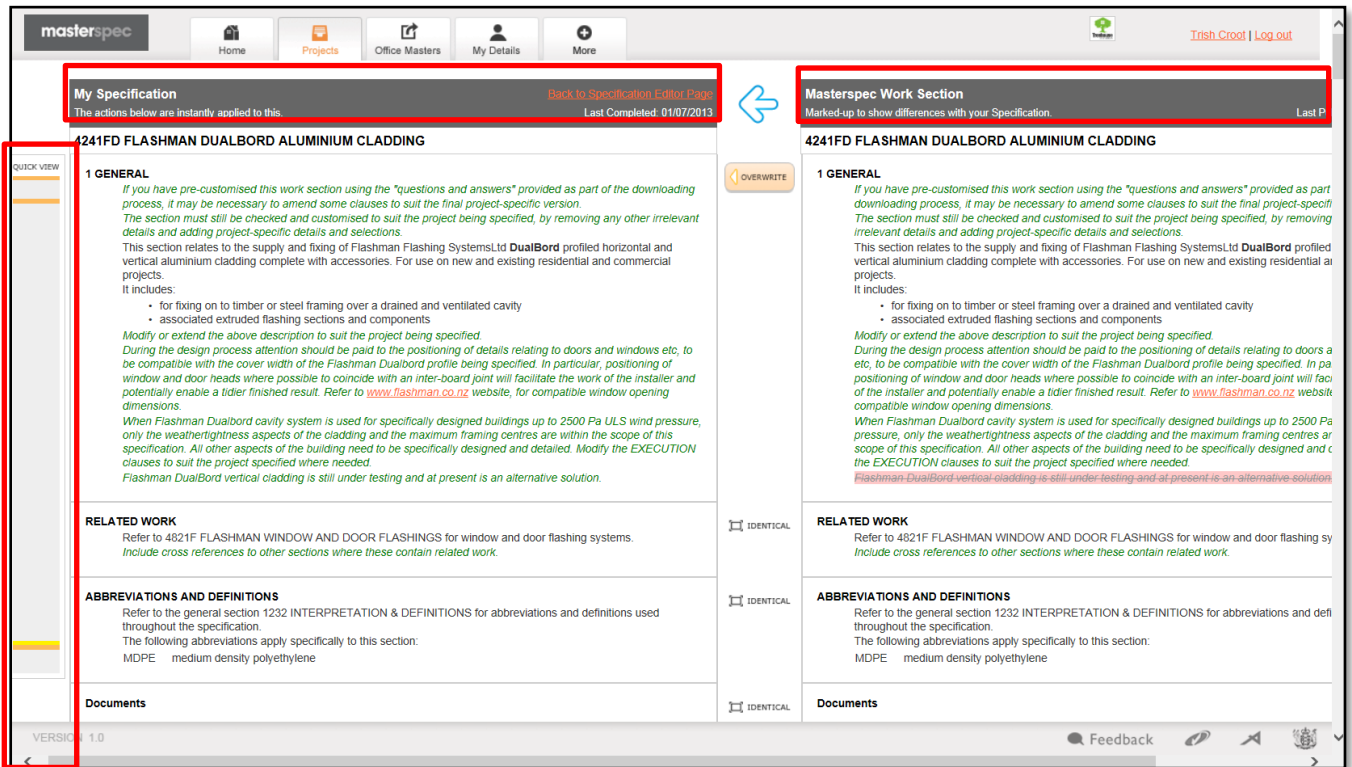


To update these sections, use the **Update Manager**. (see page 48).



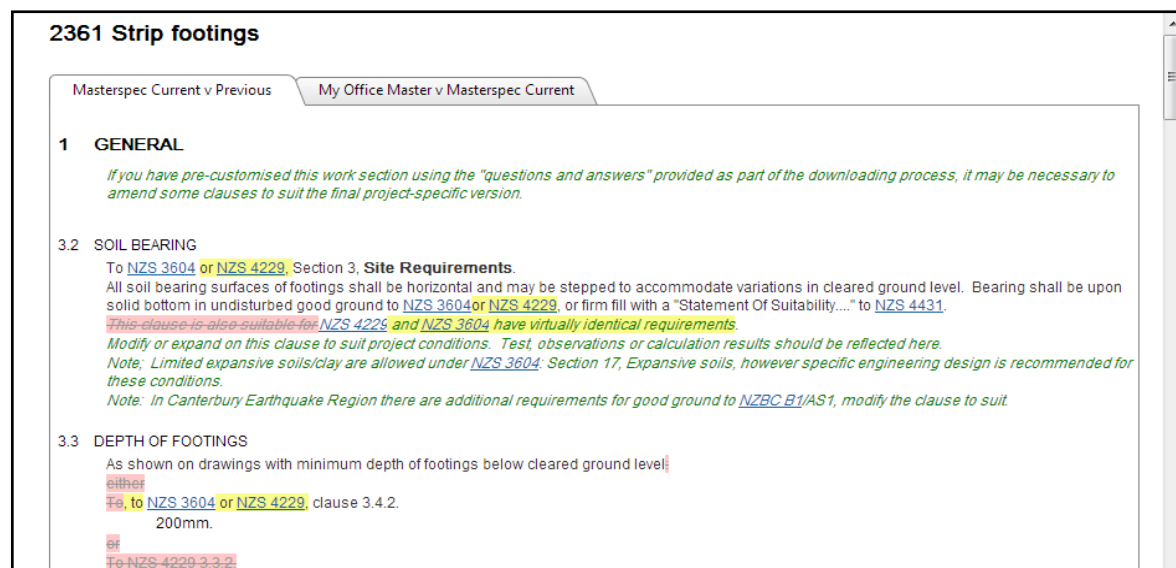
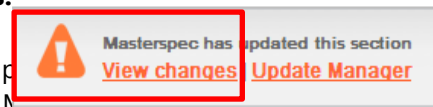
Using the View Changes / Update Manager

The **Update Manager** lets you compare your specification section with latest Masterspec section side by side with your current section on the left, and to the far left a 'Quick View' navigation panel to help you navigate directly to the changes.



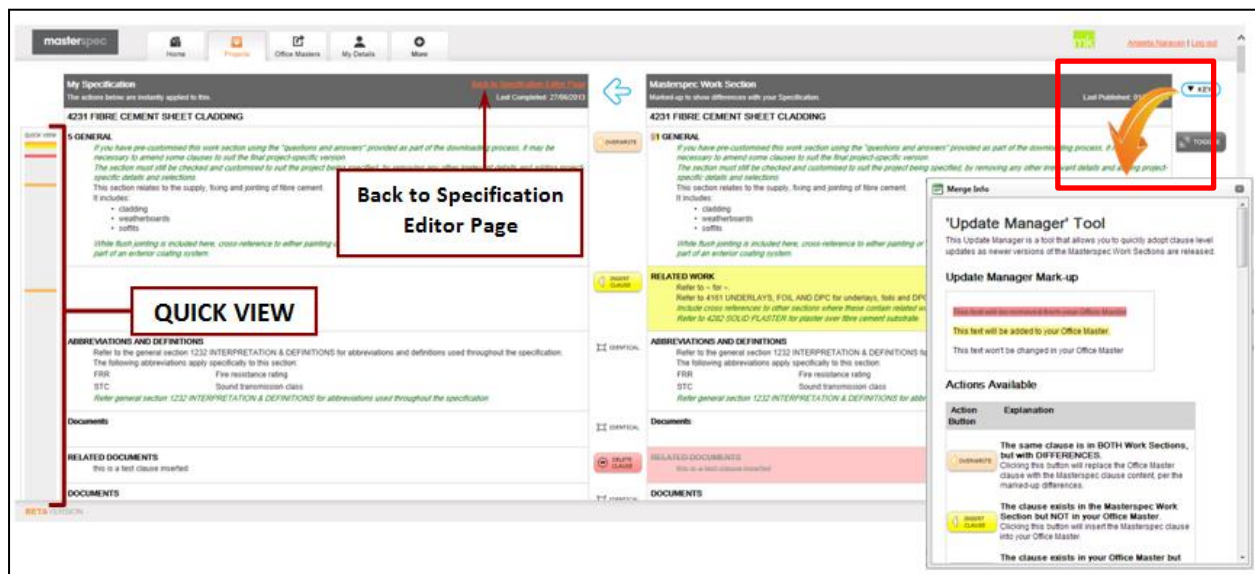
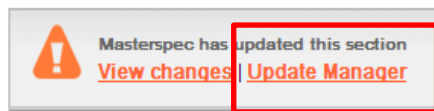
You are able to view the changes by clicking **View Changes**.

View changes lets you compare the current (updated) and previous Masterspec section and your specification or Office Master section. In the comparison, the red highlight is a deletion. Note that if you are using two screens, you can copy and paste any updated from here back into Nextgen2 clauses. This can be useful on heavily



customised clauses.

Update Manager



1. To the far right is the **KEY**, which displays a window explaining the mark-up code and the actions available.
2. **Identical** – the Worksections are exact word for word and numbered correctly. There is nothing to do here.
3. **Text highlighted in orange** are sections that are different from Masterspec to your specification. It is advisable to read through the differences and choose to overwrite or not. Text highlighted in orange is more of a critical update.
4. Text highlighted in **yellow** can be inserted. (Yellow text clauses are often removed under the Q&A process). In a specification document, it maybe that these sections are not valid for your particular project. Take care if reinserting these sections, you may also need to **complete any tildes** once you have finished with the Update Manager.
5. **Whole clause (highlighted in red)**, states that the clause has been deleted from the Masterspec Worksection. To apply this deletion to your own Worksection, click **Delete Clause**. The exception to this is **where you have added a customised clause to your own Worksection**. At this point, a decision will be made on whether you are editing, deleting or keeping the customised clause based on the relevance.

8: OFFICE MASTERS

What are Office Masters?

This is a collection of Worksections that have been combined into a single document, with majority of the customisation already applied, and then saved as a template for later use. When a new project comes up, you can use your saved Office Master and immediately be well on the way to a completed specification document.

It is advisable to have only senior or competent staff edit and maintain an Office Master. Office Masters however are able to be downloaded by all users for review and use in their

TIP

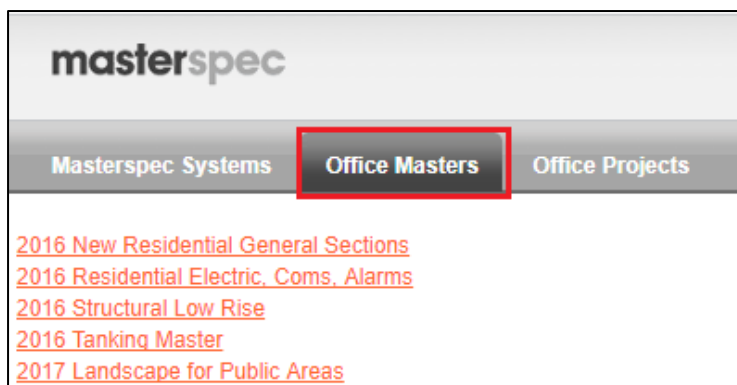
The quantity of Office Masters should be limited within a practice due to the amount of maintenance it may require at the beginning of the month when the updates from Masterspec are published. A typical month may require up to half an hour maintenance on each Master.

specification.

Building Office Masters

If you are building an Office Master containing all the Worksections that you would use as a practice, it is more efficient to have two; a current version and a draft version. The current Office Master contains sections that are finished and complete, while the draft contains Worksections you are in the process of building. Therefore, when you download the current Office Master to use on a project, none of the draft Worksections are downloaded.

When completing a Worksection under the Draft Office Master, you can then add it to the current Office Master by simply editing and adding the new Worksection from the Office Master library.



TIPS AND TRICKS

When creating Office Masters, use the **Note Tool** function for practice notes or instructions.

Recognising Out of Date Office Masters

1. If an **Office Master is out of date** there are three areas where you are notified and it is advisable not to use it till the required maintenance is done.

Refer to **Updating an Office Master using the Update Manager**.

The screenshot shows the 'Commercial Warehouse Master (Office Master)' interface. On the left, a list of projects is shown, with '3162HH Hebel Supercrcrete Commercial &' highlighted. The main area displays a table of Office Masters with columns for name, last update, and status. A red box highlights the 'Masterspec updates available' notification at the top right, which shows '8' updates available. Another red box highlights the 'Masterspec updates available' notification in the 'Specification Document' section, also showing '8' updates available.

Office Masters	Last update	Status
Abbott Warehouse	02/09/2013	EDITING
Commercial Warehouse Master	02/09/2013	EDITING
Mastic Waterproofing	30/04/2013	EDITING
Neuchatel Mastic Roof	13/08/2013	EDITING
P&G	10/07/2013	COMPLETE
Precast Building	21/08/2013	EDITING

The screenshot shows the 'Masterspec Systems' interface. A red box highlights the 'Office Masters' button. Below it, a red box highlights the 'Masterspec updates available' notification, which shows '8' updates available. Another red box highlights the '4311C Calder Stewart eurotrav' notification, which shows '8' updates available.

The screenshot shows the 'Project Details' form. The 'Type' is set to 'Existing Project'. The 'Project' dropdown is set to '-- Select Project --'. The 'Specification Details' section shows the 'Specification Name' field, the 'Author' field (Trish Croot), and the 'Create specification from' section. A red box highlights the 'Clone an Office Master' option, which is selected. A dropdown menu is open, showing a list of Office Masters. A red arrow points to the 'Treehouse OM Warehouse' entry, which is marked with an asterisk (*).

Notes:

- Treehouse OM Brick Earth
- * Treehouse OM Commercial Warehouse
- Treehouse OM P&G Commercial
- Treehouse OM P&G Sections
- * Treehouse OM Warehouse

An out of date Office Master will show with an asterisk * when you go to Clone an Office Master

You are able to Export an Office Master to a PDF document for checking and printing.

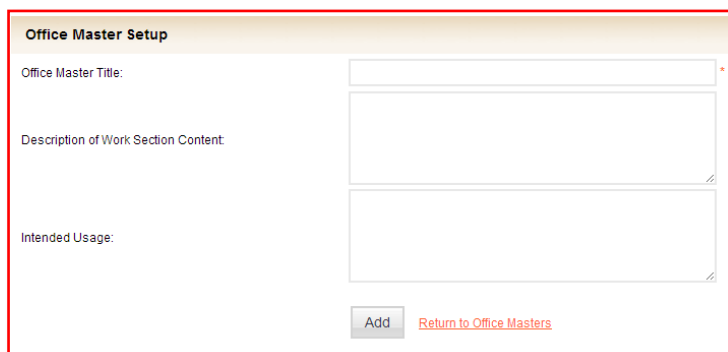
Creating a New Office Master

It is the same process as **creating a new specification**, you must populate the work flow area with Worksections by adding them from the Masterspec Library or creating a custom section.

Only users with permission have the Office Masters tab allowing creation and updating of the Office Masters.

To create an Office Master;

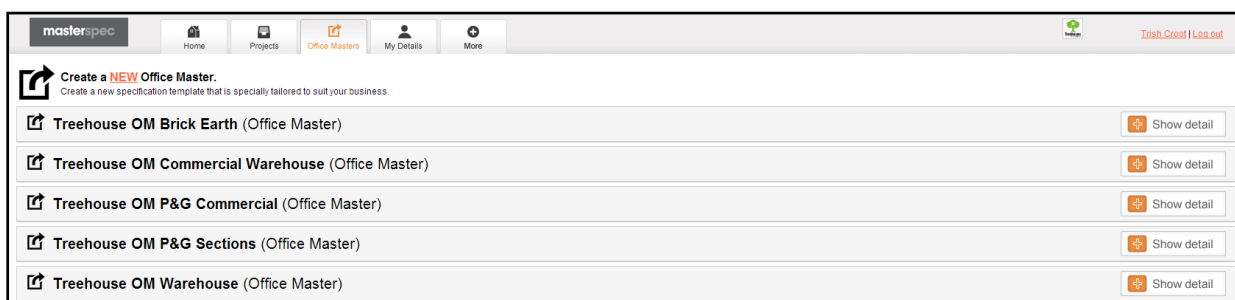
1. Click on **Office Masters** tab
2. Select **New Office Master**, fill in the required fields and click **Add**.



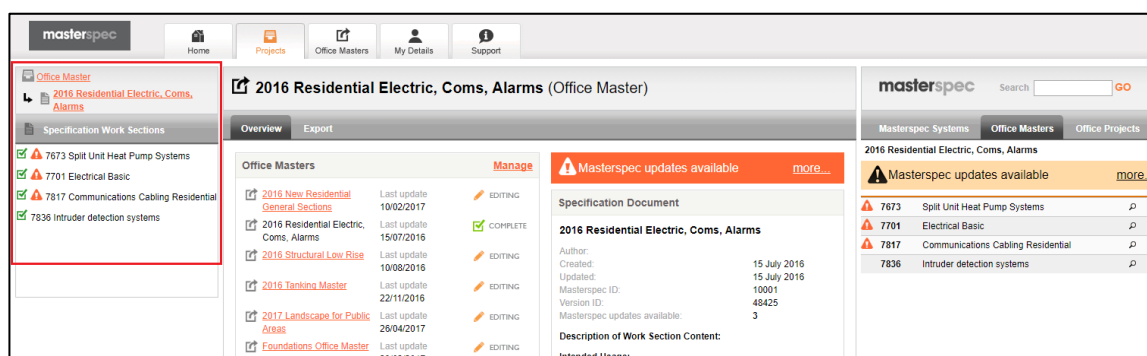
The 'Office Master Setup' form contains the following fields:

- Office Master Title:** A text input field with a red asterisk indicating it is required.
- Description of Work Section Content:** A large text area for describing the content.
- Intended Usage:** A large text area for specifying the intended usage.
- Buttons:** An 'Add' button and a 'Return to Office Masters' link.

3. It will join the list of existing Office Masters. At this stage you are now able to edit your Office Master as you would in a specification document.
4. Click **Show Detail** > **Edit Content** to begin editing your Office Master.



5. Populate the work flow section on the far left hand side by adding Worksections either from Masterspec Systems or alternatively, you are able to add already existing Office Masters Worksections from under the tab as highlighted.
6. For further information on how to edit an Office Master, refer to sections **Create a new Specification and Edit a Section**. It is the same principle for specification editing as it is editing Office Masters. Refer to **Intelligent Update Manager** for keeping Office Masters updated with the Update Manager tool.



Cloning a Specification to an Office Master

As an option for specifiers, Masterspec offers the ability to clone an existing specification into an Office Master. Office Masters are created around repeatable specification. The reasons we might do this are;

- A streamlined way to create an Office Master from an already completed specification
- Bespoke Worksection

It will be necessary to edit the Office Master to ensure that **no project specific information** exists.

1. Click TAB Office Masters, Office Masters Manage.
2. Click Create NEW Office Master.

3. Chose the option **Clone an existing Specification Document**. Define the original specification you are cloning in the drop down box.
4. Click Add. The system will establish a new Office Master and bring through any flagged updates that may be required. Continue to create / edit as you would normally, remembering to use the tilde~ where information is required.

NOTE: At this point you may delete some of the Worksections from the new Office Master if you don't need them. The Worksections will be required to be edited from "project specific" to generic.