

SpecMACROS for Word

MACRO USER'S MANUAL

Microsoft Word for Windows 2007, 2010

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Edmonton, Alberta

SpecMACROS

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INTRODUCTION

This group of macros (named SpecMACROS®) are designed to complement word processor-based specification products published by Spex.ca. These macros are intended to function with SpecSUITE® (and its library of six (6) master specifications) or the National Master Specification (NMS) master specification documents, but could be used with other section files if they are electronically formatted properly (refer to the section "Formatting Non-Digicon Files" for details).

In combination, these macro software tools will assist specifiers to develop and prepare project specifications effectively and efficiently. Macros are provided for Microsoft Word for Windows 2007 and 2010. At this time, SpecMacros are NOT compatible with Macintosh computers (but they can operate in Windows emulation mode).

WHAT ARE MACROS?

SpecMACROS are "mini" programs and are integrated into Microsoft Word as a Word "Add-In". They quickly execute a series of commands to achieve some desired function at computer speed rather than human speed. SpecMacros can quickly and easily perform numerous formatting tasks at once, and optionally perform those tasks on multiple files in a specified folder – this is one of SpecMacros most valuable time-saving attributes.

INSTALLING SpecMACROS

Pre-Requisites

SpecMacros can be installed on any Windows computer that has Microsoft Word for Windows installed. Pre-requisites include:

- Microsoft Windows XP or later.
- 32- and 64-bit versions of Microsoft Word 2007 and 2010.
- Microsoft Visual Studio Tools for Office (installed automatically with SpecMacros).

Preparation

Although installation of SpecMACROS is intended to be automatic, our install program may not detect the location of your word processor correctly and request additional information. Follow the instructions in the Installation section that follows carefully. Steps to prepare for installation include:

- Be aware of the specific version of Word you are using (your version of Word can be found using the "File | Help" menu (Word 2007, 2010).
- Make sure that the installation program is matched with your version of Word.
- Close Word prior to installation.
- Unzip the downloaded ZIP file containing the SpecMacros into a temporary folder.

Installation

To install SpecMACROS double-click the "Setup.exe" installation program. Installation of SpecMACROS is normally fully automatic. The installation software should detect the correct location for macros and proceed with installation.

If installation is successful, the next time you start Word, you will see a toolbar button named SpecMacros.

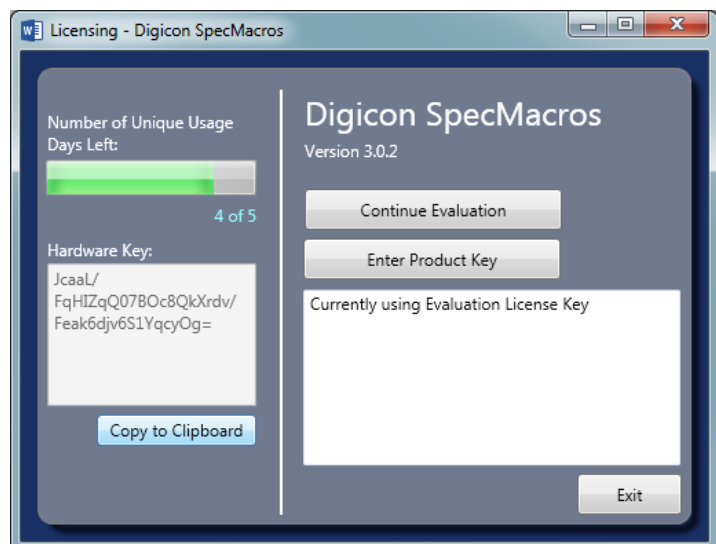
If you do not see the toolbar icon, use the "COM Add-ins" window to verify that the SpecMacros are loaded. In Word 2007/2010, a secondary Add-In install program is added to the Start menu (Start | All Programs | Digicon | SpecMacros); you can select the "Install SpecMacros" icon there.

You are now ready to use the macros; refer to the next section for information on their use.

Activating your License

Once installed, you can use SpecMacros until the 'evaluation' period is over. At any time, you can purchase the SpecMacros from Spex.ca. To activate your software, perform these steps:

- Execute the macro main menu (click on the SpecMacros icon, in the Add-Ins ribbon)
- When the license screen appears, next to the box labelled 'Hardware Code', click on the button 'Copy to Clipboard'
- Open an e-mail message and paste the code into the message, address it to support@spex.ca, and click Send
- When we receive your hardware code, we'll return the e-mail message with the Product Key (activation code). Copy this key into the clipboard.
- Click the Product Key button, paste the Product Key into the box provided, and click "Validate".



RUNNING SpecMACROS

Once installed, users can access SpecMACROS by using the SpecMacros toolbar icon (in Word 2007/2010, this button is accessible from the "Add-Ins" tab).

- In Word 2007/2010, click the Add-Ins tab, and then click the toolbar button labelled "SpecMacros".

In order to assist users in using and locating the various macros available, Digicon has provided this "Main Menu" macro which displays the list of available macros in a user-friendly manner.

Backup Frequently

Since macros inherently depend on consistently formatted documents to perform their duties, it is always possible that some of the formatting may be removed or altered by users. As a result, Digicon HIGHLY

RECOMMENDS backing before you run SpecMacros on project files – especially if the macros are executed on an entire folder of files.

MACRO OPERATION

All macros MUST be accessed from the "MainMenu" macro, which lists the various choices.

Bilingual User Interface

On the far right is a "toggle" button, which controls the language of prompts in the SpecMacros windows. By clicking the button, you can toggle between English and French screens. Sub-menus adopt the language setting in the Main Menu macro.

Macro Memory

All menus retain the settings previously input by the user. Settings are saved to the user's registry, so that they will be retained even if Word is closed and restarted.

This feature will assist users who wish to adopt an office standard, and who were previously forced to reset the macros each time they were executed. Now, users will no longer be required to remember the last settings or re-type the same text into dialog boxes.

Main Menu

For the users' convenience, Digicon has provided a Main Menu macro from which all other macros may be executed. Select one of the options in the upper half of the menu; if Editing Macros is chosen, you must select one or more editing macros to perform on your specification sections.

There are two types of macros:

- global macros, which must operate by opening an entire folder of documents (such as Table of Contents),
- editing macros, which may be operated on a single, open file (or optionally on a folder of files).

Global Macros

SpecMacros includes the following global macros, which require access to an entire folder of files (you cannot run these macros on a single open file).

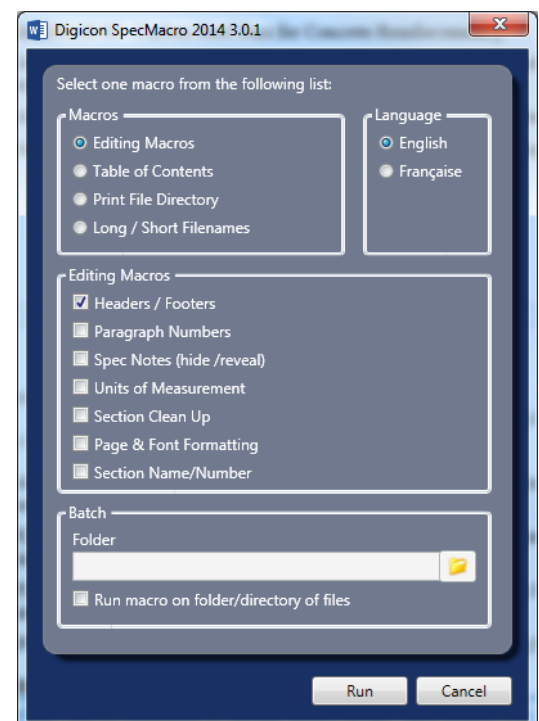


Table of Contents :

Generates a project Table of Contents by automatically opening all project files in a folder, extracting the section number, title and number of pages from each file, and writing the information to a new file. The resulting Table of Contents is sorted numerically and subtitled by Division number.

The Table of Contents macro is compatible with both MasterFormat 1995 (16 Divisions) and MasterFormat 2004 (49 Divisions). The Division titles used by the macro will be automatically selected depending on whether the first section contains a 5-digit or 6-digit number in the document properties (refer to the section "Formatting Non-Digicon Files" for information about document properties by SpecMacros).

When this macro is selected, an Options prompt is presented with three choices:

- **Add Hyperlink:** Allows users to create a hyperlink to the document on your computer. Using this feature, users can browse their project by opening the project Table of Contents, and click on the hyperlinks with their mouse to open desired section files.
- **Append Date:** This option allows users to optionally append the file date to the section name in the Table of Contents. This feature is useful for creating drafts of your project, and when you wish to see a summary of the last edit date of a section file.
- **Hide Empty Divisions:** This option determines whether Division titles are inserted, where no sections in that Division exist. Normally, this macro will insert all Division titles, and insert a "Not used" phrase. This option removes the empty Division titles entirely.



Table of Contents - Options

Print File Directory

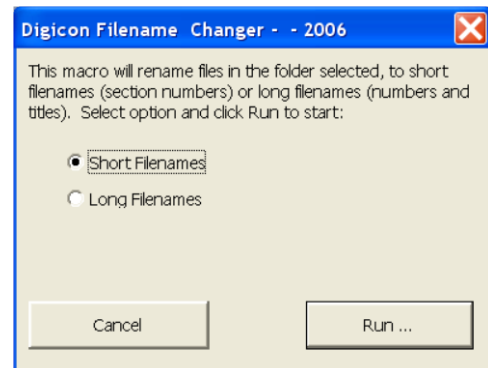
This macro will capture the filenames of all specification files in a designated folder, and send them to the printer in alpha-numeric order (Windows or your word processor sometimes uses a different order by default). The macro will use the folder designated in the MainMenu; ensure the folder you wish to print files from is designated before running this macro.

Long/Short FileNames

This macro will toggle a change to a disk file name from the short (5- or 6- or 8-digit number) to a long (5- or 6- or 8-digit number plus the full section title), and back again. This will permit ready recognition of the disk files for those who have not memorized the numbers to their section file titles. Work tasks made just a little easier.

Note: When you select this macro from the main menu, ensure the folder name in the main menu window points to your project folder where you want to rename files.

When this macro is selected, a window will prompt you to select:



Long / Short FileNames

- Short Filename: choose this option to name all word processor files in the specified folder with 5- or 6-digit (or 8-digit) MasterFormat number only.
- Long Filename: choose this option to name all word processor files in the specified folder with a long filename in the following format: "##### - SECTION TITLE". 8-digit numbers will be displayed as "#####.## - SECTION TITLE".

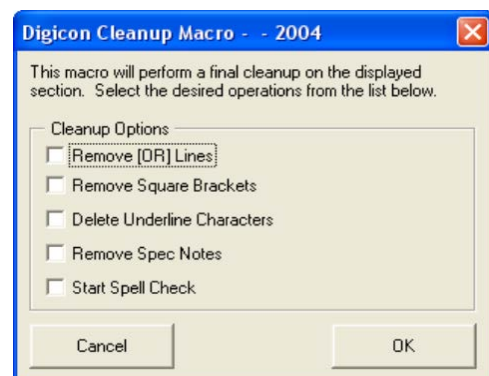
Editing Macros

Editing macros may be run on a single file which is currently open, or on an entire folder (subdirectory) of files by selecting the "Run on directory of files" checkbox at the bottom of the MainMenu macro.

Cleanup

This macro performs a number of activities designed to speed the FINAL editing process, immediately before paginating for printing. Select any or all of the cleanup options:

- Remove [OR] paragraphs, which separate optional paragraphs or articles within the master text. It is assumed that the editor has already chosen the desired option and removed the undesirable ones.
- Remove square brackets, which surround optional text within the file. It is assumed that the editor has chosen the desired options; this macro simply removes the tedium of editing square brackets around desired optional text.
- Remove spec notes, will delete all paragraphs formatted with the SpecNote style. This macro performs the same operation as the SpecNote macro.
- Start the spell check utility (if installed). Note that operating this macro on multiple files will stop the macro at each file in the batch. Users will need to click "OK" to a confirmation window after the spell check is complete for EACH file.



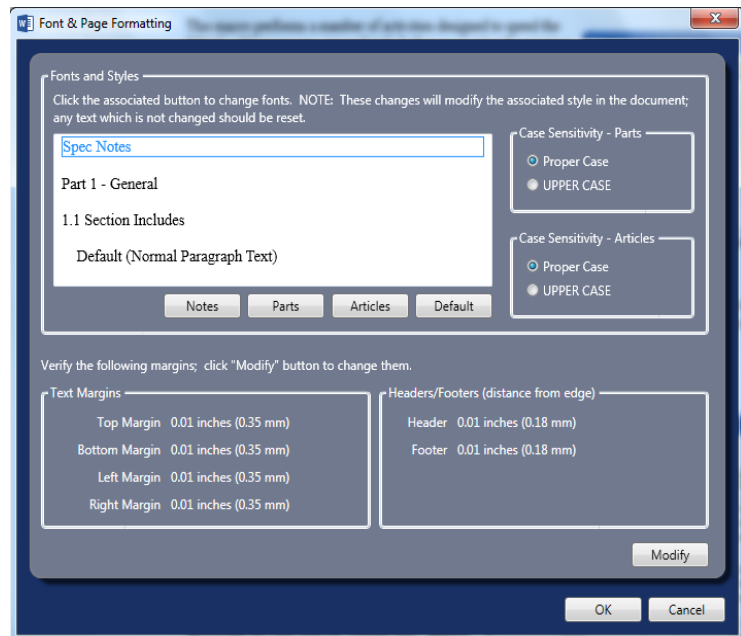
Cleanup Macro Options

Font & Page Formatting

Automatically adjusts section "styles" to meet specified fonts and page margins. This macro duplicates functionality within Word, but applies the settings globally within each section, or alternately, on an entire folder of files.

Font Settings

Adjusts both the font, and case, of the text in specifications. You have the option of specifying the base font (or Normal font - applied to the entire document), and separate font attributes for Parts, Articles, and SpecNote paragraphs. To change a font, simply click one of the buttons below the paragraph shown, and select font attributes from Word's Font dialog box.



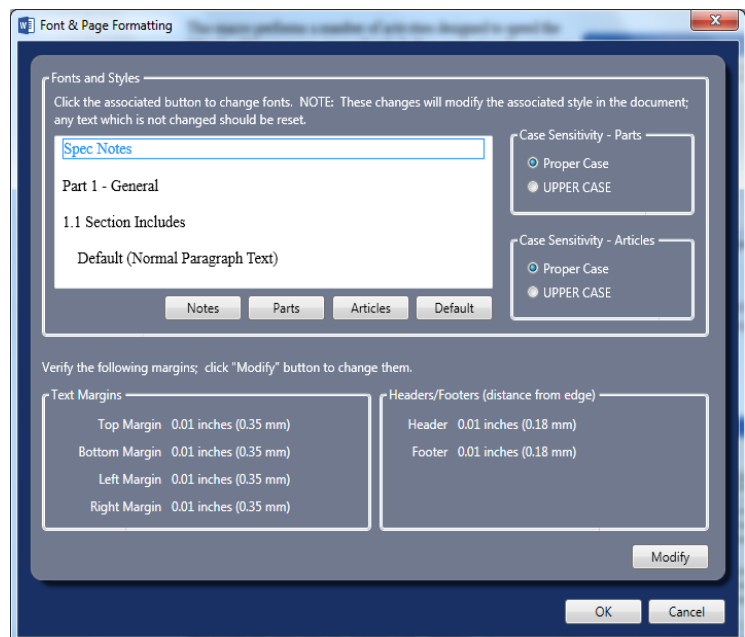
To the upper right of the paragraph shown, are Case Sensitivity settings. The upper radio buttons allow you to force Part titles to be upper case, or "proper" case (first letter capitalized). The lower radio buttons allow a different setting for Article titles.

Page Formatting

Allows you to modify page (or margin) settings. If you have a section on-screen when you run the macro, it will extract the current settings and display them for you. If you do not have a section open, it will use Word's default settings.

To change page format options, click the Modify button (bottom right). Word will display it's Page Setup menu for you (NOTE: Only the margins are captured and used; do not select other page options, such as paper size.)

Click "OK" to apply the changes.



Headers / Footers

Automatically updates the specification section header in one of three industry-standard formats. Users may choose simplex or duplex printing (to allow for alternating page header information on double-sided pages), horizontal lines, text fonts, and other options.

The Header / Footer macro option window contains a number of option tabs. The program defaults conform to CSC/NMS layout styles.

Layout Style (Preview) Tab

This tab allows users to select the basic layout of the headers or footers. Choose between the CSC PageFormat standard 3-line header, the defacto NMS 3-line header (centred section title), or CSI PageFormat 1-line footer.

Note the sample preview window at the bottom changes as you make selections in any of the options in the Header / Footer tabs (NOTE: Preview is available in Word only).

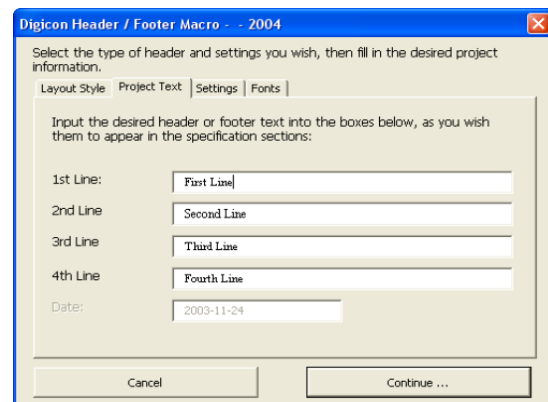
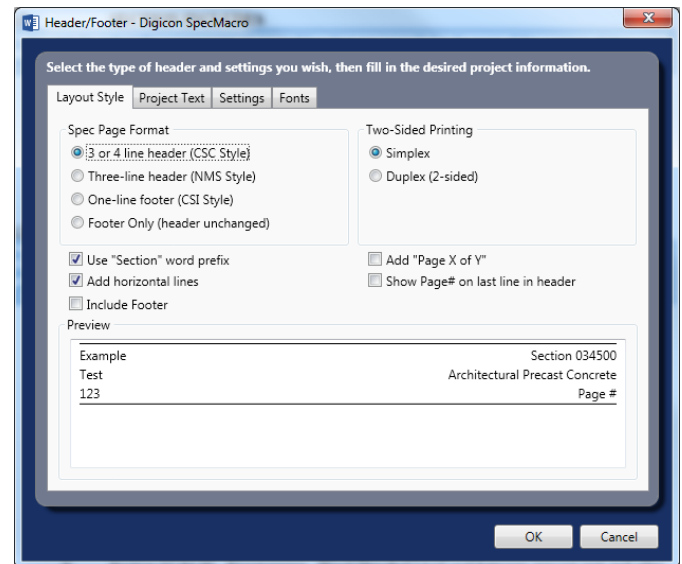
In addition, select Simplex (one-sided printing), or Duplex (double-sided printing). When Duplex is selected, the macro will alternate the Section information so that the number, title and page number are always located on the outside edge of the paper when printed.

The Layout tab is also where you may select other options for the header format:

- whether to precede the section number with the word “Section”.
- add horizontal lines on top and bottom of header text,
- use the “Page X of Y” format, where X is current page number, and Y represents the total number of pages in the Section.

Project Text Tab

This tab is where you type the project information. With CSC and NMS layouts, you can specify text in up to four (4) lines available; with the CSI footer layout, there is only a single line available (note that lengthy text is automatically split into two lines). Also, for the NMS layout, you are offered an option to include a date (date format defaults to your computer's "Short Date" format, but can be edited).

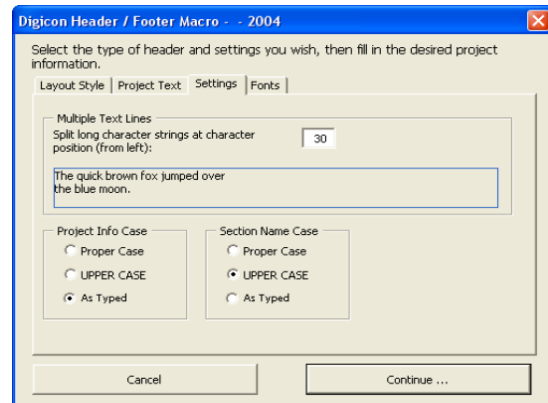


Header / Footer – Project Text

Settings Tab

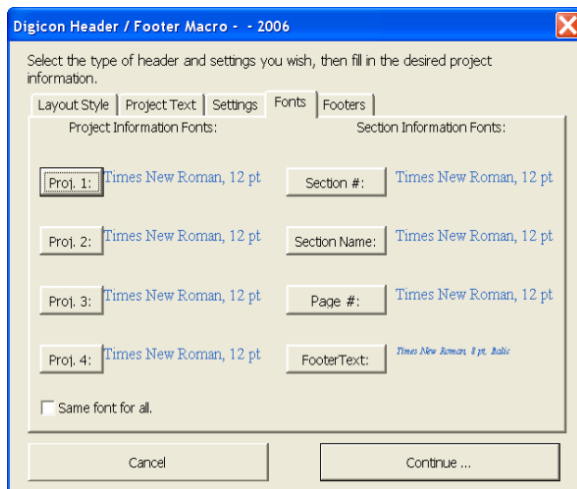
This tab allows you to set additional options about the formatting of header text.

- **Split Character Position:** This option represents the number of characters at which the macro should split a long string. The default is 30 characters, which represents a reasonable location for 11 pt text. Note that the macro will adjust left or right to split the string of characters at the nearest space character.
- **Project Info Case:** You can choose to have the macro force Proper Case or Upper Case on the project information text. Selecting “As Typed” will enter project information exactly as you type it.
- **Section Info Case:** You can choose to have the macro force Proper Case or Upper Case on the section title. Selecting “As Typed” in this case will enter section titles exactly as they appear in the



Header / Footer – Settings Options

Document Properties.



Microsoft Word - Font Settings

Fonts Tab

This tab allows you to select a font for each line of the header, on each side (for project information, as well as the section information), and for the footer (if selected). The font name and style are shown in this tab.

To change a font style, click the appropriate button to display a Font dialogue and select your attributes. The changes to font and font style should be reflected when you close the font dialogue.

To force the same font everywhere, select the "Same font for all." checkbox.

Note that the default font is determined by the formatting in the default Word “Header” style, or by the fonts selected in a previous session.

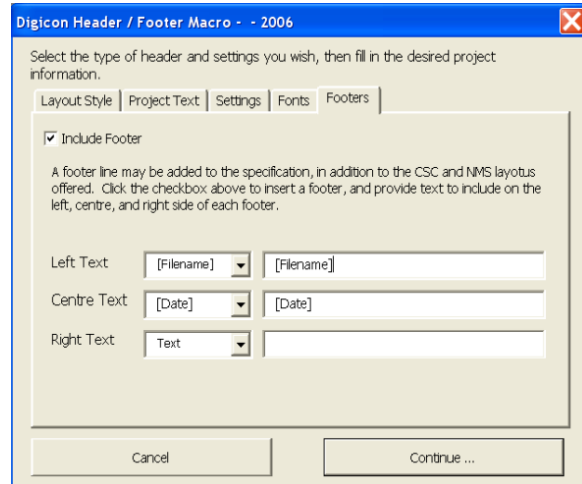
Footer Tab

This tab allows you to add an optional footer in addition to the standard headers (this feature is not available if CSI Footers is selected). To enable the optional footers, select the "Include Footers" checkbox, and insert text into the text fields for left, centre, and right side. Note that the footer font may be adjusted in the "Fonts" tab.

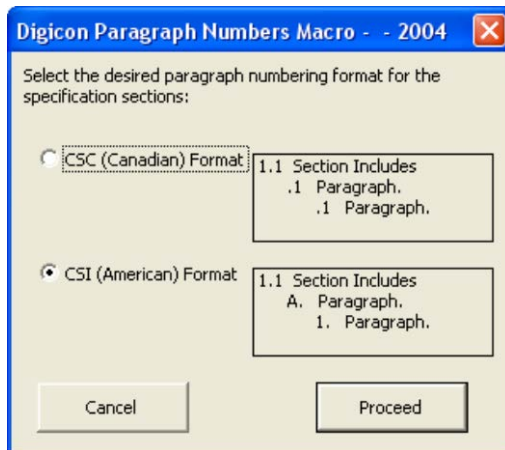
The "horizontal separator" checkbox adds a border line graphically separating the footer text from the body of the file.

You can specify different information on the left, centre, or right side of a footer. Your three choices are:

- [Filename]: This inserts the complete path to the filename (file name and folder),
- [Date]: This inserts a date "code" into the footer (uses the "yyyy/mm/dd" format),
- Text: Any text that you type into the adjacent text box.



Microsoft Word - Footer Settings



Paragraph Numbering

Toggles between the all-numeric Canadian CSC format, and the alpha-numeric American CSI numbering preferences.

When prompted, choose one of the specified numbering formats from the dialogue box.

Specification Notes

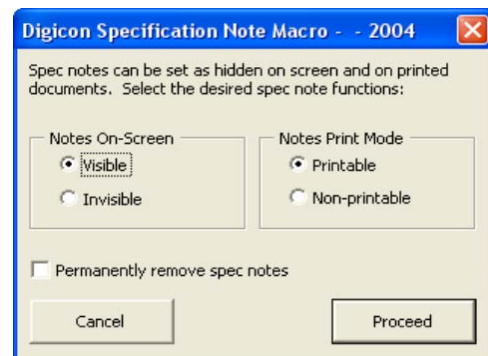
This macro toggles your word processor between printable (or viewable) and non-printable (non-viewable) specifier notes, or optionally delete them (in the event electronic files are sent to

third parties, and spec notes are not desired).

When this macro is run, the Spec Notes option window is displayed.

Select Visible or Invisible, to determine whether you can view or not view spec notes on your computer screen.

- Select Printable or Non-printable to determine whether spec notes will be included when you print spec section(s).
- Select "Permanently remove spec notes" to delete the spec note paragraphs entirely from your file(s). This option is NOT reversible, but may be useful in situations where documents are delivered to clients or owners in word processor format and you do not wish to include spec notes with the text content.



Spec Note Options

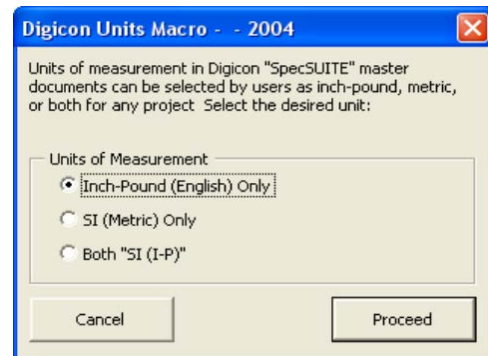
Note that you can elect to view spec notes on screen, but not print them – useful for consultants printing documents for bidding purposes. Also note the first two options are disabled if you elect to delete the spec notes.

Units of Measurement

Optionally select only IP, only SI, or both units for a specific project. (NOTE: This macro operates only on SpecSUITE master documents. NMS is published only in metric units of measurement.)

When you run the Units macro, the options dialogue is displayed with the following options:

- **Inch-Pound (Imperial) Units:** Select this option for inch-pound (imperial) units of measurement. Metric units in the master file are permanently removed.
- **Metric Units:** Select this option for SI (metric) units of measurement. When this option is selected, all inch-pound (IP) units are deleted permanently from the file.
- **Both Units:** When you select this option, both units will be retained and presented in the format “SI (I-P)”, where metric units are displayed first, followed by the inch-pound equivalent.

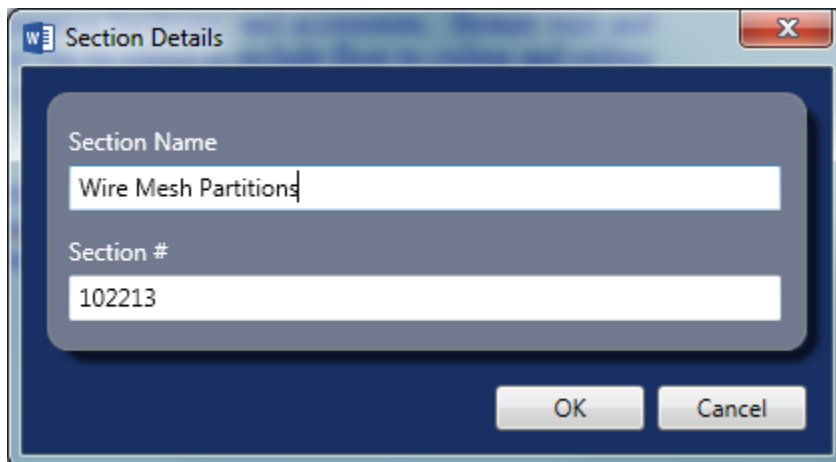


Units of Measurement - Options

NOTE: This macro is provided for convenience only. Digicon does not endorse the practice of using multiple units of measurement within a specification, which could lead to potential technical conflicts.

Section Name/Number

This macro enables users to conveniently update the Document Properties, which are used by SpecMacros to determine the section name and number. When selected, this macro displays the following window, which can then be used to update the section name and number. Once this process is complete, future Header or Table of Contents updates will be accurate. This macro is intended for custom (non-Digicon) documents.



FORMATTING CONSULTANT DOCUMENTS FOR SPECMACROS

The success of SpecMACROS operation depends on consistent and specific electronic formatting (such as files published by Spex.ca). If subscribers wish to include specification sections from outside consultants, formatting those files using the criteria outlined in this manual will ensure that SpecMACROS will run properly with them.

The listing below describes the electronic conditions which must exist in the specification file for SpecMACROS to run properly:

- *Cleanup:*

Create a style named “[OR]” and format [OR] paragraphs using the style. Normally, this would not be required for project specifications, only office master specifications.

- *Formatting - Font & Page*

Font formatting are dependent on the use of the built-in system styles called "Heading #", where # represents the desired level. Font changes are implemented by modifying the style. Case sensitivity changes are implemented both in styles, as well as modifying the text within Part and Article titles. Page formatting features do not require special preparation to work properly.

- *Headers / Footers:*

Information about the individual sections for placement in specification headers and footers is extracted from the “File Properties” (or Document Summary, depending on your version). Place the section title into the field called “Descriptive Name”; the section number is extracted from the “keywords” field. If no section number is located, the macro will extract the section number from the filename itself (it assumes sections are named using their 5-digit MasterFormat number).

- *Paragraph Numbering:*

Format automatic paragraph numbering by using the built-in system styles called “Heading #”, where # represents the desired level.

- *Specification Notes:*

Apply a paragraph style entitled “SpecNote”, and ensure the “Hidden” font attribute is included in the Style (Digicon sections also use blue text colour and italics, and a double-line paragraph border).

- *Units of Measurement:*

Format text using angle brackets (“<“ and “>”) using the following syntax:

<# mm> <<# inches>>

- *Table of Contents:*

This macro captures the same information required for the headers and footers macro. Refer to Headers/Footers above for requirements.

- *Section Name/Number:*

This macro captures the section name and number from the Document Properties (if they exist), and displays them for the user to edit. These properties are used for macros which use the section name and number.

END OF MACRO MANUAL