

Chalkline Tech Support Bulletin - Tracking Addendums and other Packaging Options

Managing Doc Versions by Submission in the Project Tree

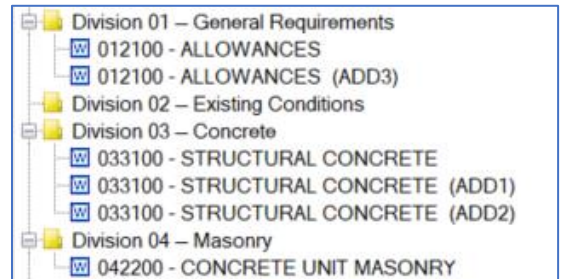
An easy way to save all your Specs at various stages such as when submissions are delivered is using the Project Export Path's (PEP) \Backups\ folder.

1. Batch Update Project Docs using Publication Group option.
 - a. Updates the Backup folder with all project docs auto applying your H/F and Styles.
 - b. Copy the \Backups\ folder to submission version such as \90_DD\ and continue working normally.
2. Another Option is Open Project > Export Project which saves the project docs in folders similar to the Project Tree. This creates a folder in your PEP that includes the project name and timestamp. The documents are exported as they were last saved to the Cloud Server so a Batch Update may still be desired.

Addendum Spec Versions saved in the VisiSpecs Project

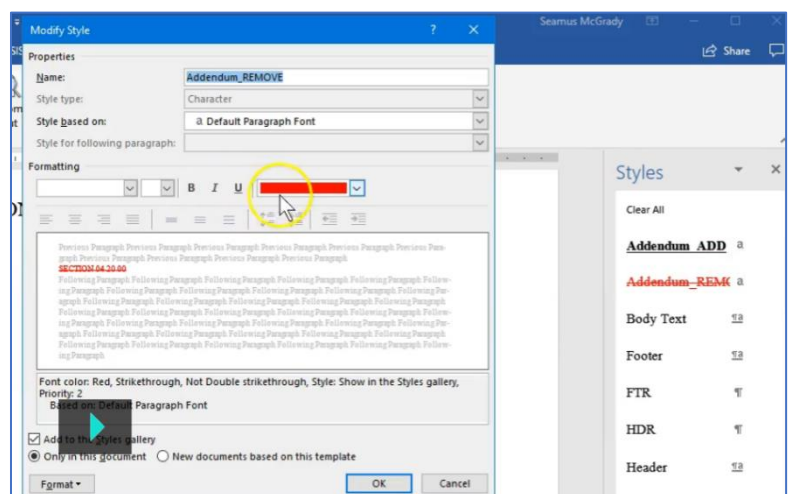
Customers have multiple options on processes to manage Addendums in VisiSpecs. Here are a few options for managing the files as well as the visual edits within the documents updated.

1. Save the doc versions directly in the project with an indicator such as ADD1, ADD2, and so forth.
 - a. Open 033100 which was delivered in 100_CD.
 - b. Save Active Doc > Save Document As and include ADD1 (or any indicator such as a date) anywhere in the Title.
 - i. TOC and H/F typically include the Section Number and Name, not the Title so this will not require further edits to the TOC or H/F. If you prefer to change those as well, you may edit the Number or Name.



2. Use Addendum "styles" to consistently display edits made. Character styles with names such as ADDENDUM_ADD, ADDENDUM_REMOVE, and ADDENDUM_CHANGE can easily be applied to highlight the edits made creating the consistent visual affect desired.

View the VisiWord Tutorial on Addendums to learn more on this option.



3. Another option is to Accept All Changes in the new ADD1 document and use Word Track Changes to indicate the changes made in this Addendum such as Insertions and Deletions.
 - a. When publishing the updated addendum doc, select the option to Include Markups. If creating a new published manual, simply select the more recent version of the docs.

- i. Toggling older docs' Exclude from TOC is another option to easily select all docs for a publish of the current manual.
- b. You will not have the paragraph and bracket options to easily strike in using this option so open and copy/paste from the first submission as needed.

Document Issued Date and Revised Date fields are also helpful to incorporate into the process as needed in the TOC or Headers/Footers.

Please email support@chalklineinc.com if any of these steps are incorrect or you have other processes you feel would be of value in this Bulletin.

Thank you.