

Chalkline Tech Support Bulletin - Auto Apply Styles and Trouble-Shooting Tips

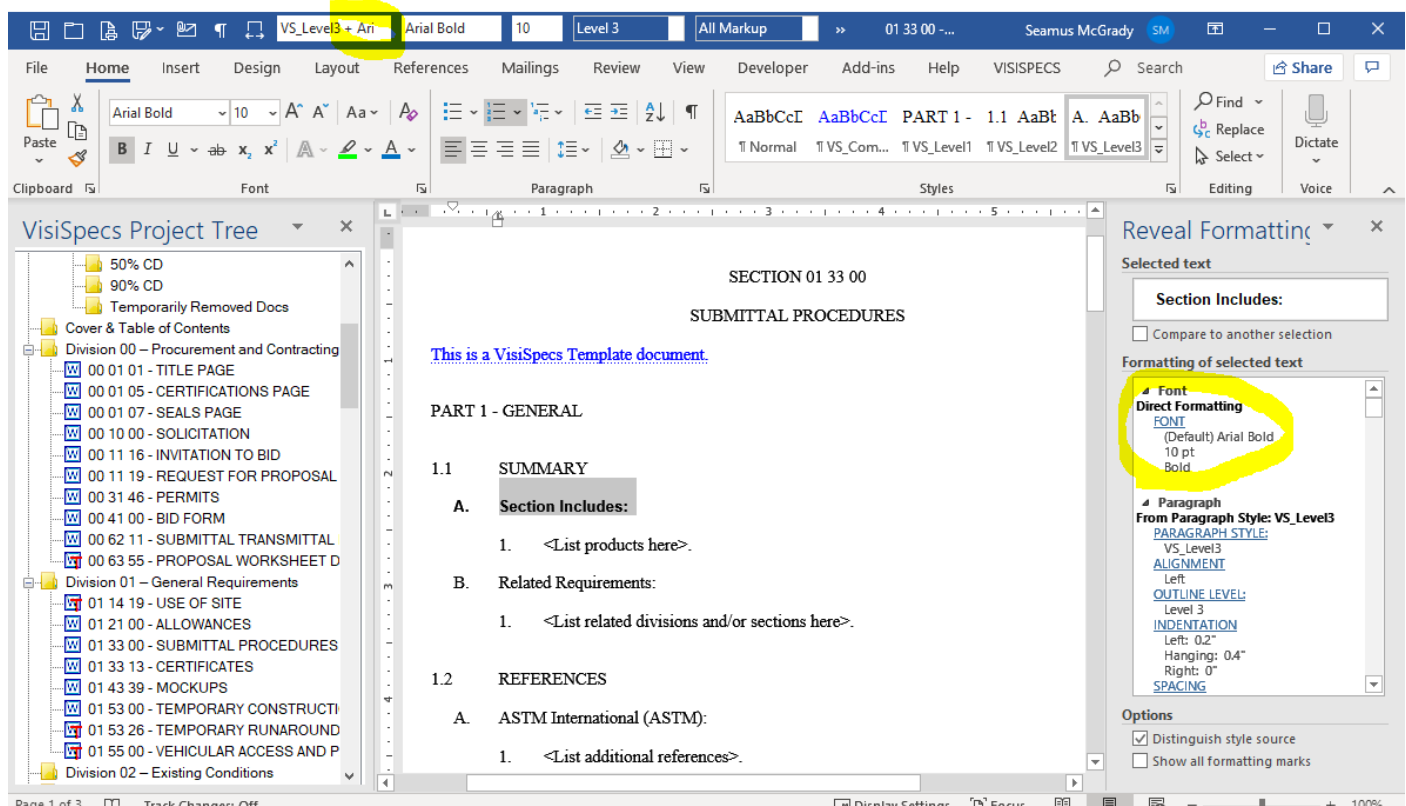
Importing documents from various sources will include a variety of formatting. When a project document is opened with the Auto Apply Styles turned on, the styles in the document get updated from the styles in the Design Guide Template (DGT). This is useful for changing project doc formatting to meet the required paragraph spacing, indenting, numbering, fonts, etc. If the project document does not have any styles and is just Normal text, styles must first be applied in order to take advantage of the auto formatting. If the project documents have paragraphs that are styled without Direct Formatting of fonts, the updating of the styles is easier as direct formatting sometimes needs to be removed to cleanly apply new styles.

Working with consultants who provide Word docs to be formatted to match your requirements, you have a few options that can save a lot of time. 1) Share your project with your consultant and have them insert, edit, coordinate specs directly in your project. They will appreciate the automatic H/F assignments and can be responsible for the formatting of their docs (or you may work with them on this). Your consultants will need a VisiSpecs license. 2) Provide your VisiSpecs DGT for them to use in their VisiSpecs Corporate account. Again, they will save time with Automatic H/F assignments and formatting of their docs/masters. If they setup their Masters, then formatting for all their Arch clients in VisiSpecs can save a lot of their time. 3) Provide your DGT requiring them to at least add the styles to their paragraphs prior to sending them to you. Again, this is much easier if they use VisiSpecs.

Be sure to setup your [Word Quick Access toolbar](#) which helps the review process. Watching the VisiSpecs Tutorial on Doc Style Updater and Mapper to follow instructions in a video format. Customers should become familiar with Word Styles and the Reveal Formatting panel to understand what styles are in current documents and steps to correct styles and direct formatting.

It is important to review the document(s) to determine your best course of action when you receive docs to format in VisiSpecs.

1. Do the docs have styles?
 - A. If not then they probably have Normal styles. Styles will need to be added prior to VisiSpecs being able to automate the formats of the various styled paragraphs. If this is a section you will likely only use in this project, you may save time doing the formatting manually in Word for this document instead of first applying styles.
 - B. If yes, are the style names the same as your Design Guide Template's style names?
 - 1) If not and the styles names are different, use the Design Manager Style Mapper to have VisiSpecs change the style names to those in your DGT and apply your styled formatting. If only one or two of the paragraph levels has styles such as the first and second level, but the rest are Normal styles then manual style assignment will be needed to take full advantage of the VisiSpecs automatic formatting.
 - 2) If yes and the styles match your DGT style names (such as PRT, ART, PR1, PR2, etc.):
 - a. Open the project doc with Auto Apply Styles turned on. Most likely your indents, par spacing, alignments will be formatted as per your DGT.
 - b. If the style names, sizes, or fonts are not updated as per your DGT, the imported doc most likely has Direct Formatting you see in Reveal Formatting and the Quick Access Toolbar:



Direct Formatting is when someone highlights paragraph(s), words, or characters and manually applies a format such as:

- Paragraph spacing
- Paragraph alignment
- Paragraph indents and hanging indents
- Font names and sizes
- Fonts such as bold, italics, underline, hidden text, color, etc.

When VisiSpecs styles are applied to a project doc, Word updates the Styles to match those contained with the DGT (both Paragraph and Char styles). Styles with same names as well as styles mapped to your DGT names get updated.

- Paragraph spacing
- Paragraph alignment
- Paragraph indents and hanging indents
- Char styles (such as units of measure)

When VisiSpecs styles are applied to a project doc, Direct Formatting of fonts applied do not get updated. This is so that desired fonts are not lost such as:

- Bold text in brackets, superscripts, all caps, underlines, italics, and such.
- Direct formatting changing font names and sizes

Usually the desired affect is to remove the direct formatting of font names (Arial, Times New Roman, etc.) and sizes so that clean styles may be changed easily. You may come across documents where someone has highlighted some or all doc paragraphs and direct formatted the font to Times New Roman 11pt, but your preferred font is Arial 10pt. After applying your preferred DGT styles, all the styled paragraphs without direct formatting will be correct Arial 10pt. However, those with direct formatting will still have the old font of Times New Roman 11pt. This can easily be seen in Word where the style name is indicated, and then direct formatting has been applied as in the image above.

If this is a document you will use just once in this project, then you may want to simply highlight all text using CTRL+A and change the font to Arial and 10pt.

If you will be using the document multiple times and will want to use the VisiSpecs automation using Word Styles, then you should remove the direct formatting leaving clean styles.

- To utilize the VisiSpecs format automation using Word Styles, then removing Direct Formatting is required.

Advanced Topics and Trouble-Shooting Tips

It is recommended to import a well formatted document to create your DGT. The commercial master docs purchased already have styles and multilevel lists setup and can be tweaked as needed. Creating a multilevel list from scratch is not easy so consult the tips you will find on the Internet.

- 1) Are your Indents or Alignments in Styles not getting applied to your project docs from your DGT as you expect?

Spec Docs typically have both Styles and Multilevel Numbering lists. When this is the case, it is important to know that the **INDENT, Hanging Indent, and ALIGNMENT settings get applied from the Multilevel lists in your DGT – not the Paragraph Styles.**

If your DGT has a Multilevel indent=.6" for ART and then you change the Paragraph Style for ART to have an indent=1" and save it, the par "looks" correct in the DGT. However, when Word (VisiSpecs) applies a style to another document the Multilevel numbering overrules the Par Style settings for alignment and indents. Your project document will have an indent of .6" based on the Multilevel numbering even though your DGT styled paragraph has a 1" indent and looks correct.

A recommendation is to change the Multilevel number settings LAST in your DGT and then do a save. Your DGT looks correct and the indent in the project document will be correct.

TIP: Setup your Multilevel Style Indents and Hanging Indent and then the Paragraph Style Tab settings.

- 2) Why are NUM and NAM styles removing the bold font or not following the SCT paragraph style?

SECTION 01 1100 - SUMMARY OF THE WORK

This is typically due to Direct Formatting by a user or specifying the font for the NAM/NUM Char style which conflicts with the SCT Paragraph Style's font. In AIA MasterSpec, NUM and NAM are character styles that have their Style based on the SCT par as shown:

Modify Style ? X

Properties

Name: NUM

Style type: Character

Style based on: a Default Paragraph Font

Style for following paragraph:

Formatting

Font: Arial, 9 pt, Not Bold, Not Italic

Section 053100 - STEEL DECKING

Based on: Default Paragraph Font

☐ Add to the Styles gallery

☒ Only in this document ☐ New documents based on this template

Format OK Cancel

This means that if you change the paragraph style of SCT to be bold or italic, then the NUM style uses the same. If instead, your DGT style for NAM or NUM has bold or "not bold" or other font characteristics, then Word has more complex algorithms to apply that style (usually not what you want - Even turning Bold to Not Bold!).

Modify Style ? X

Properties

Name: NUM

Style type: Character

Style based on: (underlying properties)

Style for following paragraph:

Formatting

Font: Arial, 9 pt, Not Bold, Not Italic

Section 03 3000 - CAST-IN-PLACE CONCRETE

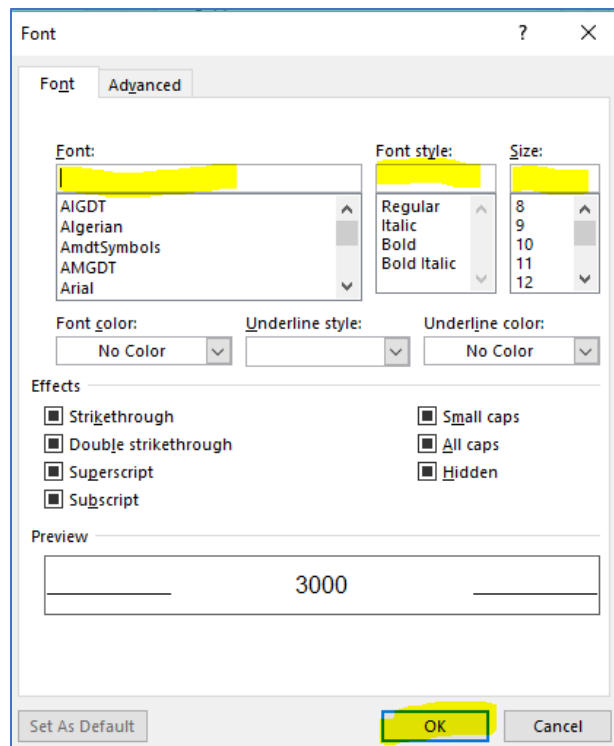
Font: Arial, 9 pt, Not Bold, Not Italic

☐ Add to the Styles gallery

☒ Only in this document ☐ New documents based on this template

Format OK Cancel

It is not easy to clear these fonts (you would expect Word to have a clear button) so you need to select the text in the following highlighted cells and click the Delete button or backspace and then OK.



This way, the Char Style will simply take on the font, style, and size of the Paragraph Style (SCT in this case).

If the applied style is still not correct, you probably have **Direct Formatting** applied to your paragraphs. To see this, use the Style Reveal Formatting and select Distinguish the source: To remove Direct Formatting, highlight the Char style (NAM) and reapply the style NAM.

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

Thank you.