

Chalkline Tech Support Bulletin - Sharing Projects with External Users

VisiSpecs is built with sharing functionality embedded. Owners can share projects with designers who can share projects with Contractors who can share projects with Asset Managers. Here we will outline a common scenario with a prime architect shares the project with subcontractors to ensure the highest level of spec coordination. Similar steps are used for Owner/Designer, Designer/Spec Writing Consultant, Designer/Contractor, and other shared project scenarios.

1. Benefits to the Prime Architect

- a. Improved project quality
- b. Project tracking of all doc edits and user interactions
- c. Share Prime Masters or allow Subcontractor Masters to be used
- d. Enables better and faster team decision making
- e. Automatic Headers, Footers, and Formatting saves time and improves product deliverables
- f. Automate the section number spacing (072900 or 07 29 00 or 07 2900) for all section names and referenced sections within the documents
- g. QA Report alerts for incorrectly referenced sections and unprocessed bracket selections

2. Benefit to Subcontractors using Shared Project (shared user)

- a. Easy insertion of Prime Architects master specs or Consultants master/project specs
- b. Header/Footer and Formatting automated by Prime Architect (saves 2-8hrs per submission!)
- c. Easily coordinate references sections
- d. QA Report on selected sections ensures highest quality
- e. Evaluate for internal use for all other projects

The subcontractor is required to subscribe to at least one VisiSpecs License which can be as little at \$178 for two months. See the VisiSpecs [Pricing](#) page and calculator and contact Sales@Chalklineinc.com for installation and subscription details.

The Prime Architect creates the project and sets up the Referenced Masters for use on the project. The Prime Architect manages the Project Settings, Design Manager, and templates, and can review the Project Log of activity. The project is shared via **Administration > Manage User Access**. Click the **External User Project Access** tab and use the **Add External User** field at the bottom left. Each username must be added to share the project with that user and the users must already be licensed.

The Subcontractors open the shared project via **Open Project > Shared Projects**. The shared user may insert their required specs from the search path or the shared user's own project/master docs. The shared user may also import files from their file system into the project.

The shared user can coordinate with other specs and see the header/footer and formatting if desired automatically applied to their docs. Use the VisiSpecs Doc Outliner, double-click editing, VisiPublish views and other time-saving editing features. Also utilize the QA Report to validate referenced sections and bracket options are complete as well as generate submittal and outline reports, spec sheets, and spec books for their own projects.

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.