

# ProjectSpec™

## User Guide

### Contents

<b>What is Project Spec?</b>	page 1
<b>What's New in ProjectSpec 4</b>	page 1-2
Classic and Spreadsheet View	
Classic View	
Spreadsheet View	
Export/Import	
Pricing	
Improved User Control	
<b>Toolbar Icons</b>	page 3
<b>Commands</b>	page 3-5
<b>Screen Views</b>	page 6
New Fields	
Classic View	
SpreadSheet View	
<b>Pricing a SIF File</b>	page 7
Price Line	
Price From Catalog	
Price From File	
Price Lowest	
<b>Discounting a "Specific" File</b>	page 7-8
Discounting "Specific"	
Discount Table	
AutoDiscount	
<b>Catalog Viewer</b>	page 8
What is the Catalog Viewer?	
<b>Catalog Manager</b>	page 9
What is the Catalog Manager?	
Activate and Deactivate	
Opening and Closing a Catalog	
Catalogs on a Network	
Search Order	
<b>Selecting Options</b>	page 10
Manual	
AutoOptions	
<b>StandardOptions</b>	page 11-12
What is StandardOption?	
Creating StandardOption Tables	
Create from File	
Managing StandardOptions	
Option All	
<b>Part Picture Table</b>	page 12
<b>Combining SIF Files</b>	page 13
Merge	
Expand Merge	
<b>Selection Requirements</b>	page 14
<b>Find and Replace</b>	page 14
Find	
Replace	
<b>Sorting</b>	page 14
<b>Inserting Subtotals</b>	page 14



**ProjectMatrix**

11687 Lebanon Road  
Cincinnati, OH 45241  
513-554-1665

support@projectmatrix.com

### What is ProjectSpec?

ProjectSpec is the industry's most powerful and easiest to use full-featured product specification package. ProjectSpec allows users to create a parts list with options (fabrics, trims, finishes, etc.) and prices. This specification can be used for bids and proposals to customers, invoices and purchase orders, and is in a format that can be used to send orders electronically to a manufacturer. In addition, ProjectSpec files can be imported into some accounting and asset management systems. The program combines a user-friendly interface with production driven features. These features make it available to virtually all levels of the dealer and design professional staff - design, sales, order processing, development and management. The ProjectSpec site license allows for the program to be on any computer at a single location, including portables for the professional on the go! Inventory control, client standards programs, and "what if" tools are available for the sales management team. ProjectSpec works for everyone at an affordable price.

### What's New In ProjectSpec 4?

#### Classic and Spreadsheet View

- No empty screen at start up
- Price Zone field by record
- Status Icon for each record line
- Taxable field for each record line
- TAG 3 (20 characters) field
- Volume, Extended Volume and Extended Weight field

#### Classic View

- Up to 5 record lines on the screen
- Scrollbar tooltip
- Picture for each record
- Option field toggles between Codes, Descriptions, Both or Off

#### Spreadsheet View

- More user-friendly Spreadsheet view
- Sort by any field
- Move and Hide columns

#### Export/Import

- Import or Export Excel (.XLS) files
- Import or Export Tabbed Delimited Text (.TXT) files
- Import or Export Custom SIF (.SIF) files

## Contents Cont.

<b>Inserting Part Numbers</b>	page 15
Starting From Scratch	
Wild Card Search	
<b>Special MFG Codes</b>	page 16
<b>Status Icons</b>	page 16
<b>ProjectInfo</b>	page 17
<b>ProjectAnalysis</b>	page 17
<b>Custom Layout Setup</b>	page 18-19
Templates Explained	
Selecting A Template	
Creating Template Groups	
Setting Default Templates	
Creating A PDF File	
Editing A Template	
<b>Printing In ProjectSpec</b>	page 20
Creating A Report	

### What's New In ProjectSpec 4? Cont.

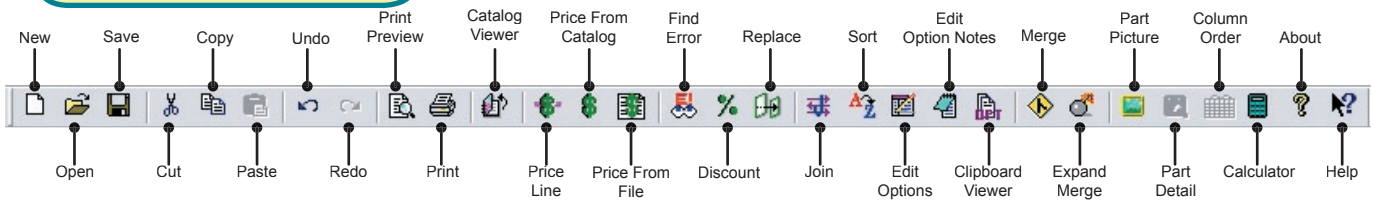
#### Pricing

- Price Lowest
- Adjust List Price
- Lock list Price

#### Improved User Control

- UNDO and REDO
- Sorting
- StandardOptions from File
- Option Notes
- Printing











### Toolbar Icons



### Commands

Name	Icon	Short-Cut	Pull Down Menu Path	Description
About ProjectSpec			Help/About ProjectSpec	Displays the version of the running copy of ProjectSpec.
Adjust List Price			Price/Adjust List Price	Allows the user to adjust the list price up or down by a factor.
Arrange Icons			Window/Arrange Icons	Moves and aligns minimized open SIF files to the lower left corner of the application screen.
AutoDiscount			Price/AutoDiscount	Toggles ON and Off. When on, each new record will be discounted during data entry based on the active discount table.
AutoOptions			Options/AutoOptions	Toggles On/Off. When on, AutoOption will automatically select a previously selected option if it is available again within the same part.
Both		Alt+B	View/Field/Options/Both	Displays Codes and Descriptions vertically. If necessary a scroll bar will appear to allow viewing of all descriptions and codes.
Calculator			Tools/Calculator	Launches the Windows Calculator.
Cascade			Window/Cascade	Arranges multiple open SIF file in an overlapping mode.
Catalog Manager			Tools/Catalog Manager	Allows user to control what electronic catalog is active or inactive and also if specific manufacturers' electronic catalogs are open or closed.
Catalog Viewer		F2	View/Catalog Viewer	Opens the electronic catalog based on information in the active record. This command will prompt for missing information.
Check for Newer Version			Help/Check for Newer Version	Automatic checks for updates for ProjectSpec over the web.
Classic		F12	View/Interface/Classic	Displays all price fields in the "classic" ProjectSpec view.
Clear			Edit/Picture/Clear	Removes pictures from the active SIF file.
Clear			Options/Edit StandardOptions/Clear	Clears the StandardOption se
Clear All			Edit/Picture/Clear All	Removes ALL pictures from the active SIF file.
Client			View/Interface/Screen	Disables Dealer Purchase discounts and prices as well as calculated margins. Use this mode to save SIF files to give to clients as Dealer Percent is not saved in this mode.
Clipboard Viewer		F4	Options/Clipboard Viewer	Allows the user to save sets of options so they can be reused on different records.
Close			File/Close	Closes the active SIF files.
Code		Alt+[	View/Fields/Options/Code	Displays the Option Codes horizontally.
Copy Record		Ctrl+Shift+C	Edit/Copy Record	Copies a record or records from the active SIF file and places the information on the Windows clipboard. The requested records will remain in the active SIF file.
Copy Record Range			Edit/Copy Record Range	Copies a record or records from the active SIF file and places the information on the Windows clipboard. The requested records will remain in the active SIF file.
Create Standard Options from File			Options/Create Standard Options from File	Creates a new StandardOption set from an existing SIF file. This will add all options from the existing SIF file to the Standard Option table.
Custom Layout Setup			File/Custom Layout Setup	Allows the user to modify how a printed SIF file will appear.
Cut Record		Ctrl+Shift+X	Edit/Cut Record	Cuts a record or records from the active SIF file and places the information on the Windows clipboard. The requested records will be removed from the active SIF file.
Cut Record Range			Edit/Cut Record Range	Cuts a record or records from the active SIF file and places the information on the Windows clipboard. The requested records will be removed from the active SIF file.

### Commands Cont.

Delete Record		Alt+Del	Edit/Delete Record	Cuts the active record from the SIF file and does NOT place the information on the Windows clipboard.
Delete Record Range			Edit/Delete Record Range	Cuts a record or records from the active SIF file and does NOT place the information on the Windows clipboard. The deleted records will be permanently removed from the active SIF file.
Description		Alt+]	View/Fields/Options/Description	Displays the option descriptions vertically. If necessary a scroll bar will appear to allow viewing of all descriptions.
Discount		F11	Price/Discount	Applies Purchase and/or sell discounts to a record or records in the active SIF file.
Edit			Edit/Picture/Edit	Allows the user to add pictures to the SIF file.
Edit Option Notes		Alt+F5	Options/Edit Option Notes	Allows the inclusion or modification of notes as they pertain to the options of the active record.
Edit Options		F5	Options/Edit Options	Displays the option set of the active record for modification.
Exit			File/Exit	Closes ProjectSpec and any SIF file open.
Expand Merge		F8	Edit/Expand Merge	Replaces references to existing SIF file(s) with the individual record details of those files.
Export			File/Export	Allows the user to save SIF files as several common file formats.
Field Repeat		F3	Edit/Field Repeat	Duplicates the information in the current field from the previous instance of being in that field.
Fields			View/Fields	Toggles how information is displayed on the screen.
Find		Ctrl+F	Edit/Find	Allows the user to search for certain information contained in the active SIF file. Starts at the current record and continues down.
Find Error		Ctrl+E	Edit/Find Error	Searches for the first record with an error in the active SIF file. Starts at the current record and continues down.
Help Topics			Help/Help Topics	Displays the main index of the ProjectSpec help file.
Hide			View/Fields/Options/Hide	Hides Codes and Descriptions.
ICF Explode			Tools/ICF Explode	Special feature designed for ICF.
Import			File/Import	Allows the user to open some common file types into ProjectSpec.
Insert			Price/Subtotals/Insert	Inserts a subtotal record into the active record. The subtotal is for all previous items to the previous subtotal or the beginning of the file, whichever occurs first. The previous active record and all subsequent records will be shifted down to accommodate the inserted subtotal.
Insert by Field			Price/Subtotals/Insert by Field	Inserts multiple subtotals based on a selected field. The file is first sorted by that field and subtotals are inserted at the end of each unique instance of that field. The subtotal is for all previous items to the previous subtotal or the beginning of the file, whichever occurs first.
Insert Blank Record		Alt+Ins	Edit/Insert Blank Record	Inserts the requested number of blank records into the active record. The previous active record and all subsequent records will be shifted down to accommodate the inserted record.
Interface		F12	View/Interface	Toggles how information is displayed on the screen. Classic or Spreadsheet or Explorer. Normal or Client.
Join		F6	Edit/Join	Combines like records with matching criteria in the active SIF file and totals the quantity.
Lock List Price			Price/Lock List Price	Locks the List price field so the value can NOT be altered.
Edit Manually			Options/Edit StandardOptions	Creates or modifies the active set of Standard Options.
Merge		F9	Edit/Merge	Inserts a reference to another existing SIF file into the active record.
New		Ctrl+N	File/New	Begins a new ProjectSpec (SIF) document.
Normal			View/Interface/screen/Normal	Displays all price fields in the classic ProjectSpec view.
Open		Ctrl+O	File/Open	Opens an existing ProjectSpec (SIF) document.
Option All		F10	Options/Option All	Automatically applies StandardOptions to the entire active SIF file.
Options			View/Fields/Options	Toggles what information is displayed in the "Options" field. Code, Description, Both, Hide or Spreadsheet columns.
Page Setup			File/Page Setup	Dialog that allows the user to change settings for a printer.

## Commands Cont.

Part Picture Association			Edit/Picture/Part Picture Association	Allows the user to edit the Part Picture Association table.
Paste Record		Ctrl+Shift+V	Edit/Paste Record	Pastes the record or records from the Windows clipboard to the active SIF file. The record or records will be inserted into the active record. The previous record and all subsequent records will be shifted down to accommodate the inserted records.
Preferences			Tools/Preferences	Displays a dialog box of user configurable settings such as Autosave and Colors.
Picture			Edit/Picture	Allows the user to add or remove pictures to a SIF file.
Picture			View/Picture	Displays an associated graphic to the active record. (Only available for certain Manufacturers.)
Price From Catalog			Price/From Catalog	Updates the selected records in the active file with prices and descriptions. This button will NOT prompt for missing information.
Price From File			Price/From File	Replaces the selected record items in the active SIF file by matching the part number, and optionally Tags, in the selected SIF file.
Price Line		F7	Price/Line	Updates the active record with prices and descriptions. This button will NOT prompt for missing information.
Price Lowest			Price/Lowest	Updates the selected records from the active file with the lowest price including options from the catalog and updates the descriptions. This button will NOT prompt for missing information.
Print		Ctrl+P	File/Print	Prints the active SIF file based on the selections made in File/Page Layout.
Print Preview			File/Print Preview	Shows a view of the active SIF file as it will be printed based on the selections made in File/Page Layout.
ProjectAnalysis			Tools/ProjectAnalysis	Starts the ProjectAnalysis program that will compare multiple SIF files.
ProjectDetail			Tools/ProjectDetail	Future feature NOT available at this time.
ProjectInfo			Tools/ProjectInfo	Opens the ProjectInfo dialog box for input of non-furniture related expenses and miscellaneous supporting information including purchase order numbers, scheduling, and shipping instructions. Saved information creates a CIF file.
Quick Print		Ctrl+Q	File/Quick Print	Prints out what's viewable under the spreadsheet view.
Quick Print Preview			File/Quick Print Preview	Shows a view of the active SIF file as it will be printed if using the Quick Print.
Recover Auto Save			File/Recover Auto Save	Opens the auto save file. Used when current file is missing or damaged.
Redo		Ctrl+Y	Edit/Redo	Reverses the action of the undo command.
Remove Subtotals			Price/Subtotals/Remove Subtotals	Deletes all of the subtotal records from the active SIF file.
Replace		Ctrl+R	Edit/Replace	Finds and replaces fields or portions of fields in the active SIF file.
Save		Ctrl+S	File/Save	Saves the current ProjectSpec document.
Save All			File/Save All	Saves all open SIF file(s) using their current names.
Save As			File/Save As	Saves the active Sif file and prompts for a specific name.
Smart Copy		Shift+F4	Edit/Smart Copy	Duplicates the options from the most recent part number that contains the same first four characters.
Sort			Edit/Sort	Sorts the active SIF file by criteria.
SpreadSheet		F12	View/Interface/SpreadSheet	Displays the active SIF file in a spreadsheet format to allow more records to be visible.
Spreadsheet Columns		Alt+C	View/Options/Spreadsheet Columns	Opens Dialog box that controls what columns are visible in the spreadsheet view.
StandardOptions			Options/StandardOptions	Toggles On/OFF. When on, StandardOption will automatically select an option detected in the active StandardOption set if it is available for that part.
Startup			Help/Startup	Launches the ProjectSpec Startup screen.
Status Bar			View/Status Bar	Alternately displays or hides the ProjectSpec Status Bar.
Tile			Window/Tile	Arranges multiple open SIF files in a non-overlapping (tiled) mode.
Toolbar			View/Toolbar	Alternately displays or hides the ProjectSpec Toolbar.
Undo		Ctrl+Z	Edit/Undo	Reverses the last command or deletes the last entry you typed.
Unlock List Price			Price/Unlock List Price	Unlocks the List price field so the value can be altered.

## Screen Views

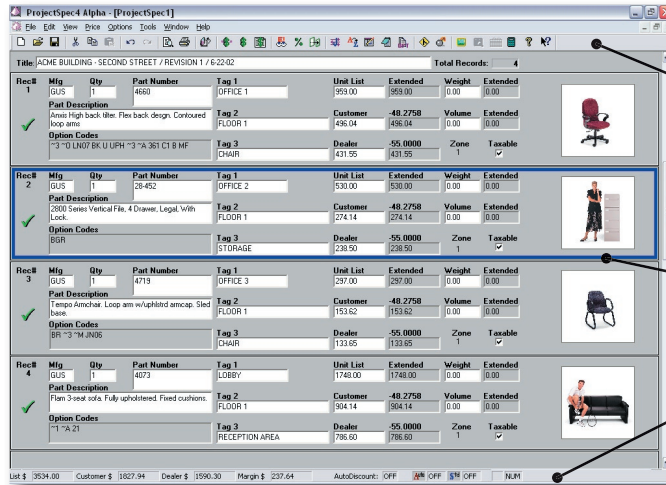
### New Fields

ProjectSpec has been greatly enhanced in Version 4. Many of these enhancements have been the addition of new fields. Some of these new fields are additions to existing fields like Tag 3 to Tag 2. The others are new fields with new meanings, most of which the manufacturers will have to supply in their electronic catalog. Below is a brief listing of the new fields and where they come from.

New Fields	Where it comes from
Ext Weight	Calculated from Weight
Picture	Catalog / User Input
Long File Name	Merge File Name
Model Description	Catalog
Part Class	Catalog
Part Description Ext.	Catalog
Tag 3	User Defined
Taxable	User Defined Yes or No
Volume	Catalog / User Input
Zone	User Defined 1 to 5

### Classic View

The Classic View screen has been modified to handle all the new fields. With two layouts you can now switch back and forth with ease (F12). Changing the view has no effect on the file. You can now take full advantage of both views and use the best view for your particular task. Below is a sample of the classic view record box and all the information it shows. One of many changes to the classic view is the total number of records visible on the screen. It's now variable to the size of your screen. In the older version you could enlarge your computers available space but ProjectSpec could not take full advantage. In the latest version the number of records visible will increase as your screen size increases, this is true until you reach the maximum of 5 records.



Toolbar

Record Line

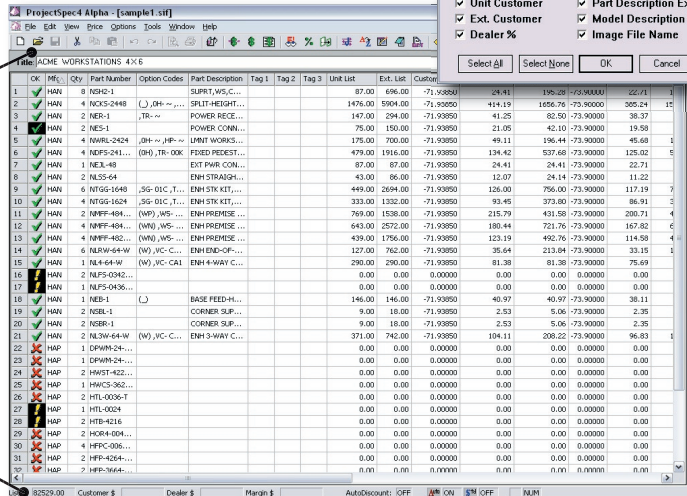
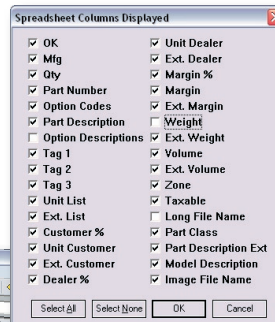
Current Record

Status bar

### SpreadSheet View

SpreadSheet view has been totally incorporated into the latest version of ProjectSpec. The SpreadSheet view previously allowed only viewing and basic editing. Now it takes on an entirely new form. You now have two complete views of the same file. As your active record changes in spreadsheet or classic, each view will show the new active record.

The box to the right shows the columns Display dialog box. Which can be found by going to View/Options. This box will control which columns are displayed in SpreadSheet view, allowing you to view more or less of the data.




Toolbar

Status bar

## Pricing a SIF File


### Price Line

Price Line will update the active record's price and description along with any option description and up charges from the catalog. If there is missing information this command will NOT prompt the user.

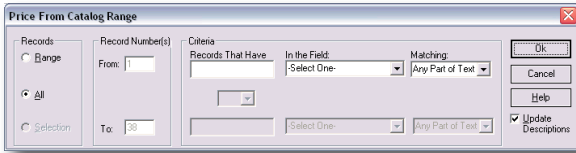
1. Select the record you want to update.
2. Press F7 or select the Price Line icon. 

### Price from Catalog

Price from Catalog will update records based on selection criteria in the active file with prices and descriptions. This button will NOT prompt for missing information.


1. Select the Price from Catalog icon. 
2. Fill in your selection requirements.
3. Press the "OK" button.

The price supplied from this command and others is the base price in the catalog if there are no options selected. There could be up charges or deducts when selecting options.

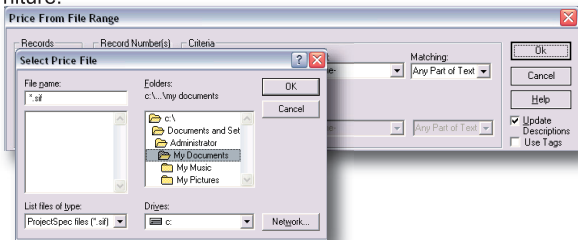


### Price from File

Price from File will update records based on selection criteria in the active file with prices and descriptions from the chosen file. This button will NOT prompt for missing information.

1. Select the Price from File icon. 
2. Fill in your selection requirements.
3. Press the "OK" button.
4. Select the file you want to use for pricing.
5. Press the "OK" button.

This command will take the selected record and look for matching records in the chosen file, and then bringing over the new information from that file. This is commonly used for old pricing or custom furniture.



### Price Lowest

Updates records based on selection criteria from the active file with the lowest price including options from the catalog and updates the descriptions.


1. Select Price/Lowest from the pull down menu.
2. Fill in your selection requirements.
3. Press the "OK" button.



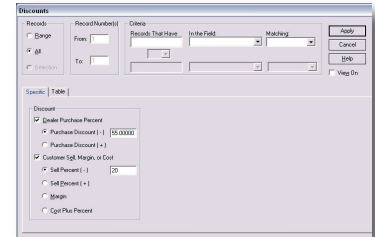
## Discounting a File

### Discounting "Specific"

Discounting will apply Purchase and/or sell discounts to records based on selection criteria in the active SIF file.


1. Select the Discount icon. 
2. Fill in your selection requirements.
3. Choose Specific.
4. Select Dealer Purchase Percent.
5. Then choose Purchase Discount (-) or (+). Minus will give you a lower Dealer price than List price. A positive will give you a Dealer price larger than List.
6. Type in desired discount, this can be a tiered number (50/10/5 unlimited tiers) or a percent (50.55352%).
7. Then choose Customer Sell, Margin, or Cost
8. Select Sell Percent (-), Sell Percent (+), Margin, or Cost Plus Percent. Minus will give you a lower Dealer price than List price. A positive will give you a Dealer price larger than List.
9. Type in desired discount, can be a tiered number (50/10/5 unlimited tiers) or a percent (50.55352%).
10. Press the "OK" button.

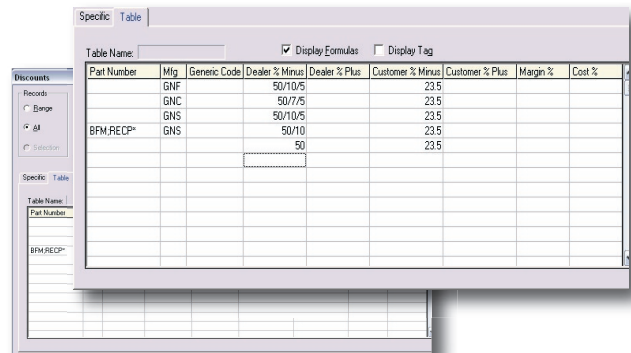
In most cases the criteria is a MFG code. If there are multiple MFG codes and each code has different discounts you will have to run this command more than once.



### Discount Table

If you use the same discount structure often it may be of use to create a Discount Table. Using the table function allows you to discount a file with multiple discounts using different criteria in one easy step. In addition a Discount Table can be saved and used again.

1. Select the Discount icon. 
2. Fill in your selection requirements.
3. Choose Table
4. Fill in the Discount Table that builds your structure. See example below.
5. Select Save As to save table for later use. (Optional)
6. Press the "OK" button.

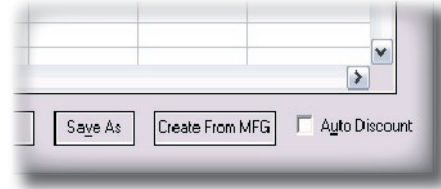


## Discount Cont.

### AutoDiscount

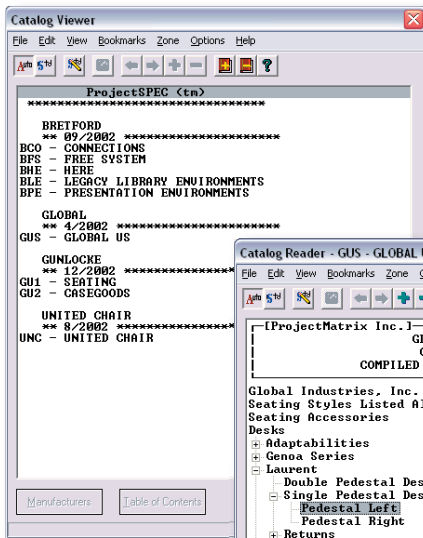


AutoDiscount will automatically discount a new or edited record using your current Discount Table. If AutoDiscount is on, the customer and dealer price will update based on your discount table. You can turn on AutoDiscount by selecting it in the discount dialog box (see right) or on the status line by double clicking AutoDiscount (see above) or in the pull down under Price/AutoDiscount.

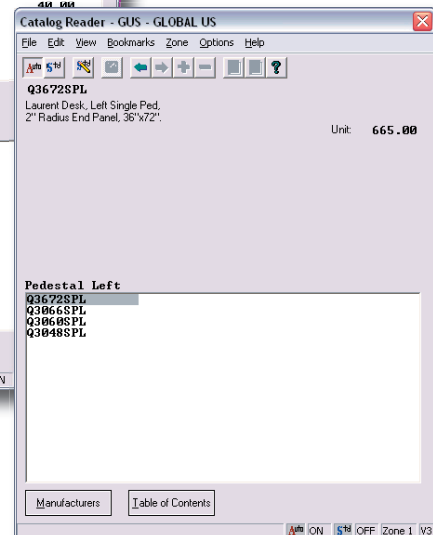
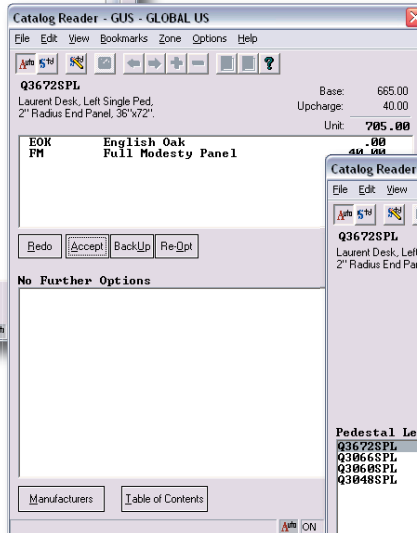
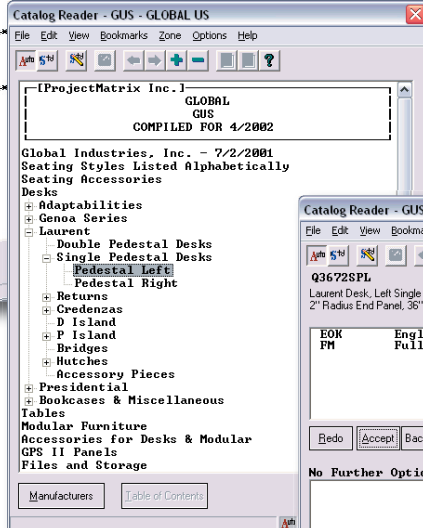


## Catalog Viewer

### What is the Catalog Viewer?



The Catalog Viewer is used to add parts or to apply options to a part. Press one button (F2) and the Catalog Viewer opens and tries to go to the manufacturer code on the active record. If that catalog is available, it then goes to the active records part number. After finding the active records part number it will prompt for options for that part. In doing this the incomplete record will have an updated List price and any options selected by the user and any other information contained in that manufacturer's catalog will be available.

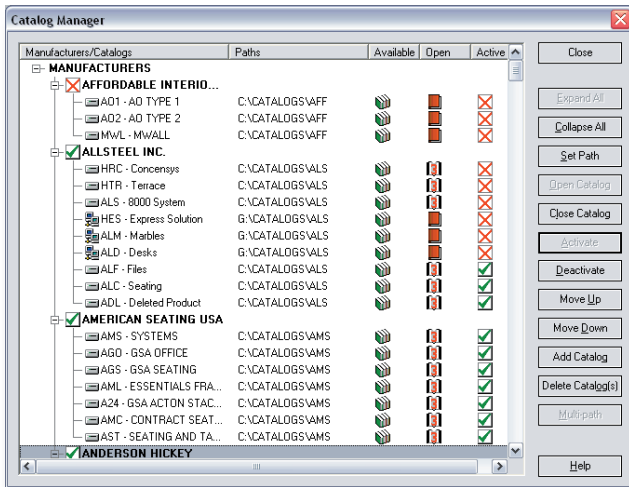




## Catalog Manager

### What is the Catalog Manager?

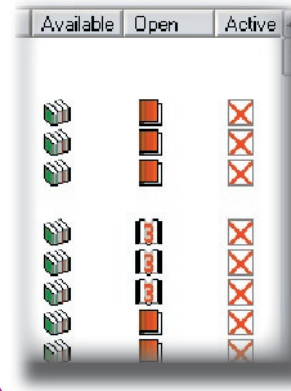
The Catalog Manager allows you to organize your installed catalogs. You can open and close catalogs, you can control which catalogs are active or inactive, as well as where your catalogs are located. We will cover each topic in detail in this section.



### Opening and Closing a Catalog

A catalog comes in two states Open and Closed. ProjectSpec can only read an open catalog. So to use a catalog it has to be open, but a closed catalog takes up less space on your hard drive or network drive.

The Catalog Manager shows the distinction between open and closed catalog in the open column. In the enlarged example below the first three catalogs are closed. This is shown by the icon of the closed book or catalog. The next three catalogs are open. Its icon is an open catalog.



#### Opening a Catalog

1. Select the Catalog or manufacturer that you wish to open.
2. Press the "Open Catalog" button on the right.
3. The icon should now change to the open icon.

#### Closing a Catalog

1. Select the Catalog or Manufacturer that you wish to Close.
2. Press the "Close Catalog" button on the right.
3. The icon should now change to the Closed icon.

### Activate and Deactivate

A catalog can not only be opened or closed, it can also be active or inactive. The active status of a catalog tells ProjectSpec if a catalog should be searched or used for pricing or options. This allows catalogs that are not used to be removed from the search criteria and will speed up searches for parts and options.

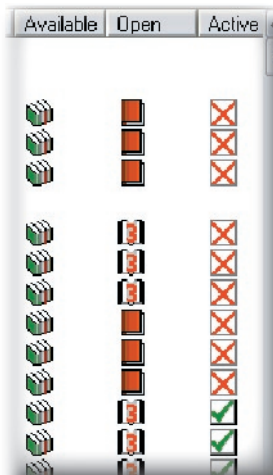
NOTE: If a catalog is closed, it can not be active.

#### Setting a Catalog Active

1. Select the Catalog or Manufacturer that you wish to Activate.
2. Press the "Activate" button on the right.
3. The icon should now change to the active icon. ✓

#### Setting a Catalog Inactive

1. Select the Catalog or Manufacturer that you wish to De-activate.
2. Press the "Deactivate" button on the right.
3. The icon should now change to the inactive icon. ✗



### Catalogs on a Network

In a situation where multiple users are all connected on a network it may be easier to have your catalogs on a shared network drive. The latest version of ProjectSpec has been designed to handle this better than ever before. In this situation one person will install the catalogs onto the network drive from any terminal they choose. Then from any terminal that has ProjectSpec installed they will tell ProjectSpec where the installed catalogs are. Unlike older versions the installed catalogs and their status of open or closed is maintained on the shared drive. This allows all users to see the current status of the shared catalogs. Personal settings like active or de-active will be saved per each terminal's settings. For detailed information for your situation please contact ProjectMatrix's technical support.

### Search Order

ProjectSpec can search for part numbers in catalogs. The order of catalogs searched is in the order that they appear in the Catalog Manager. You can change the order by moving Up or down Manufacturers or catalogs inside a manufacturer. This is very useful if you want ProjectSpec to always look in a particular catalog first such as Quick ship catalogs or GSA pricing.

#### Setting Search Order for a Manufacturer

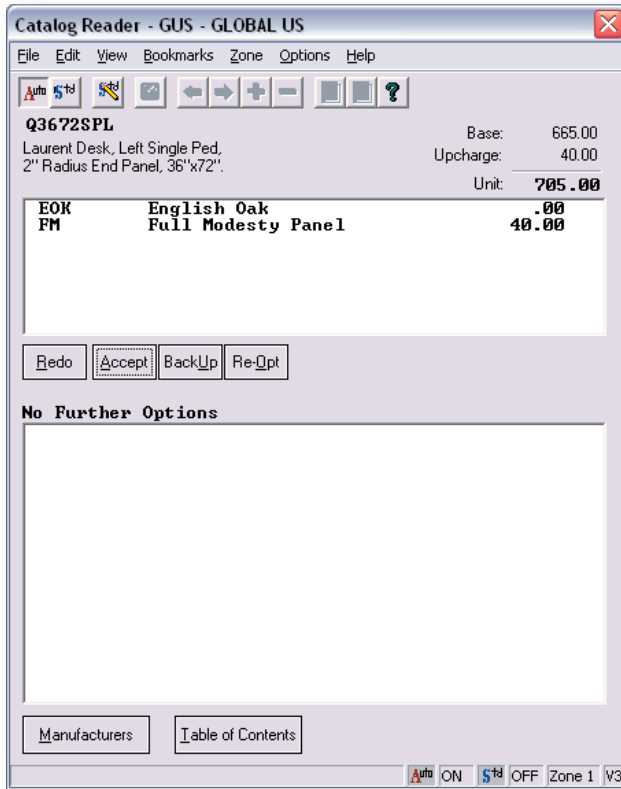
1. Select the manufacturer that you want to move up in the list.
2. Press the "Move Up" or "Move Down" button.
3. Repeat until manufacturers are in the proper order.

#### Setting Search Order within a Manufacturer

1. Select the catalog that you want to move up in the list.
2. Press the "Move Up" or "Move Down" button.
3. Repeat until catalogs are in the proper order.


## Selecting Options

### Manual



When you are selecting options from the electronic catalog ProjectSpec will prompt only for options needed for that part, and in the order that the manufacturer has set. Also when you select options ProjectSpec will update the list price with any up charges or deductions for that part number.

#### To select options Manual

1. Select the record you wish to update.
2. Press the Catalog Viewer button or F2. 
3. Double click on the desired options from the lower box.
4. When NO more options appear in the lower box, press the "accept" button.

After selecting options, your active record should scroll to the next record allowing you to repeat from step 2 for the next record.

Selecting options will automatically prompt for any missing information in a record. (I.E.. MFG code or Qty.)

This will also fill in any information supplied from the catalog such as weight, volume or picture.

Rec#	Mfg	Qty	Part Number	Tag 1	Unit List	Extended	Weight	Extended
39	HAG	1	3300X		1232.00	1232.00	0.00	0.00
<b>Part Description</b>				<b>Tag 2</b>			<b>Volume</b>	<b>Extended</b>
CHAIR, CREDO, MANAGERIAL LARGER MODEL							0.00	0.00
<b>Option Codes</b>				<b>Tag 3</b>			<b>Zone</b>	<b>Taxable</b>
METAL-GRY HEAD-LHR ~GRADE4 ~MOMEM ~ARRAY 09115431 ARM-SPA CAST-STD ~NOESD ~							1	<input checked="" type="checkbox"/>

### AutoOptions



When on, AutoOption will automatically select a previously selected option if it is available again within the same part.

The most common example of this is when a panel can be optioned out with different fabrics on each side. You would select the first side of the panel as you normally would. When the second side becomes available, AutoOption will automatically select the same fabric. This works on all parts not just panels. If an option that is already selected becomes available again within that same record, AutoOption will select the previous select option again.

AutoOption can be turned on or off by selecting the word Auto in the status line at the bottom of the screen. It can also be found under Options/AutoOptions where it can be toggled as well.

## StandardOptions

### What is StandardOptions?

StandardOptions allows you to setup options that are used often and have the computer automatically select these options. When available, this will increase accuracy and speed of selecting options from an electronic catalog. Essentially, you build a list of desired options for ProjectSpec to use, and as you select options the selected options become the default.

For StandardOption to work, ProjectSpec has to know what options or option to look for. This can be done in several ways. We will cover the most common methods in this section.

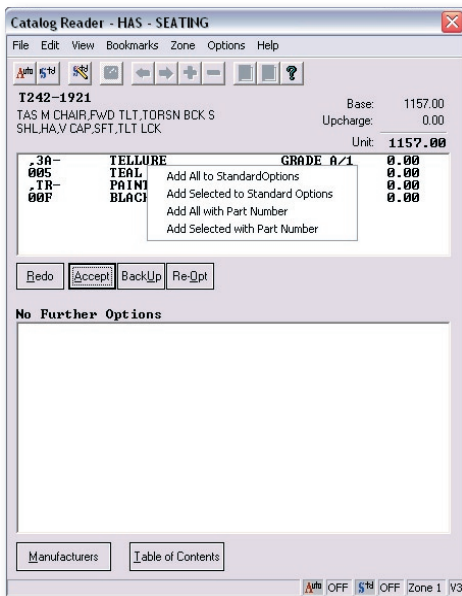


Figure 1

### Creating StandardOption Tables

Creating a StandardOption table will greatly decrease the time it takes to completely option a file. In the StandardOption table you can tell ProjectSpec that one set of options is for one set of parts (Defined by part numbers or Manufacturer codes or tags), and/or have one set of options for everything else. When the table is used for selecting an option, the most specific record in the table will be used before the less specific record.

In the example below we will cover both types of records universal and specific.

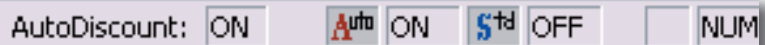
Go to a part with the options that you wish to add to the StandardOption table. Option it using the Catalog Viewer (F2). Before you press the "Accept" button you will add desired options to the StandardOption table.

1. Right click on the option in the top portion of the Catalog Viewer that you wish to make a StandardOption.
2. Choose "Add All to StandardOptions" to add this set of options to the less specific or choose "Add All with Part Number" to create a specific StandardOption. (See Figure 1)
3. The StandardOption table will appear showing that option or options that you selected have been added. (See Figure 2)

(NOTE: The part number in the StandardOption table can be changed to include Wild Cards such as an asterisk "\*" or question marks "?". Ex. WS-\* or WS-???-N)

4. Repeat steps 2 and 3 until all options needed are added to the StandardOption Table.
5. Press the "Accept" button after all needed options are added.
6. Repeat all steps until all StandardOptions are set up.

In most cases, you can create and use StandardOption at the same time. By adding StandardOptions and optioning out records with StandardOption on you can quickly option out a complete SIF file.



StandardOption can be turned on or off by selecting the word:"STD" on the status line at the bottom of the screen. It can also be found under Options/StandardOptions where it can be toggled on and off at well.

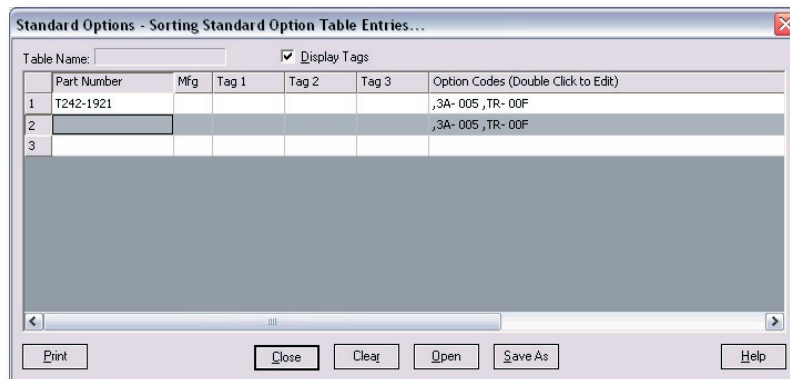


Figure 2

## StandardOptions Cont.

### Create from File

The Create from File feature will annualize a SIF file and add all the options selected in that file to your StandardOptions, making it very quick to create a new StandardOption file from your current SIF file. This is a great way to start building StandardOptions for a client that has standard fabrics or materials.

### Managing StandardOptions

Once a StandardOption table is created it can be saved and opened for later use. This can be done from the Options/Edit StandardOptions pull down menu. (See Figure: 2) This dialog box allows you to Save, Load, Remove options, and even change the order of selection by moving options up or down in the list.

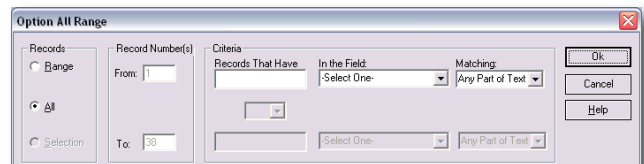
NOTE: If a StandardOption table was set up in ProjectSpec, that set of options will still be the current options until they are removed or replaced by a new set of options.

### OptionAll

OptionAll automates the process of using StandardOptions in a SIF file. To option a file using OptionAll you will first need to create a StandardOption file. Once a StandardOptions table is created and current, you can then run OptionAll.

1. Go to Option/OptionAll or press F10.
2. Fill in your selection requirements.
3. Press the "OK" button.

ProjectSpec will begin to option your selection. If OptionAll can not option a particular record completely, it will pause and allow you to select an option.



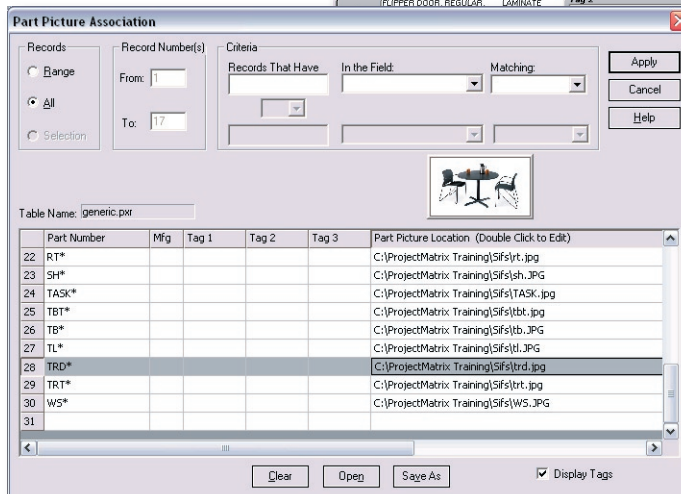
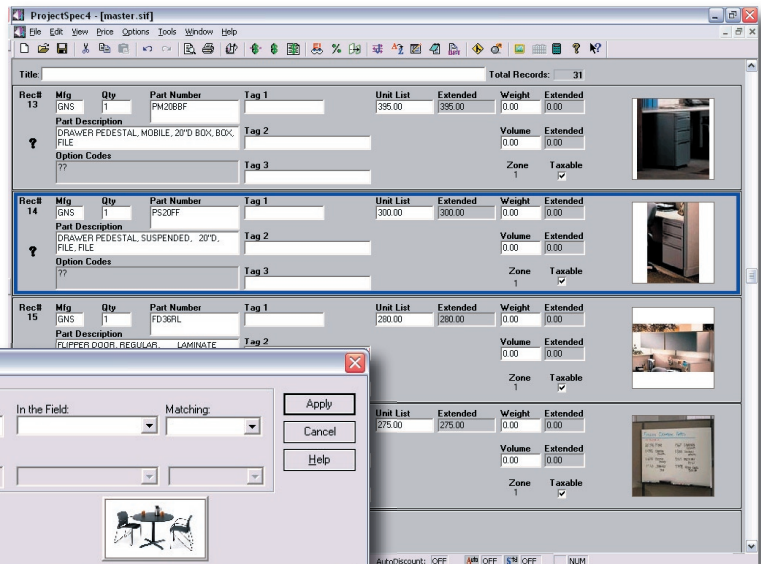
## Part Picture Table

The Part Picture Table was designed to ease the insertion of graphics into your ProjectSpec files. Once a picture is assigned to a Part Number, or any of the other categories, that picture is automatically inserted if a record matches your table.

To build the table, choose Edit/Pictures/Edit from the pull down menu or right click on the ProjectMatrix logo to the right of the record that you want to add a picture to. This will bring up a Select Picture dialog box. Browse to the graphic and select the picture that you want associated with this record. Select the "Open" button.

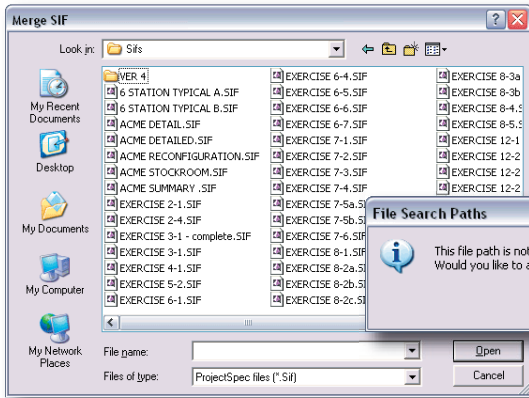
After selecting the image you will be prompted to choose if you want to add that picture to your Part Picture Table. By answering Yes, that picture will be added to your table. If you answer No the picture will be assigned to the record and not added to the Part Picture Table.

You can manually edit the table by going to Edit/Picture/Part Picture Association. Here you can add wild cards to part numbers and allow one picture to work for multiple part numbers.



## Combining SIF Files

### Merge



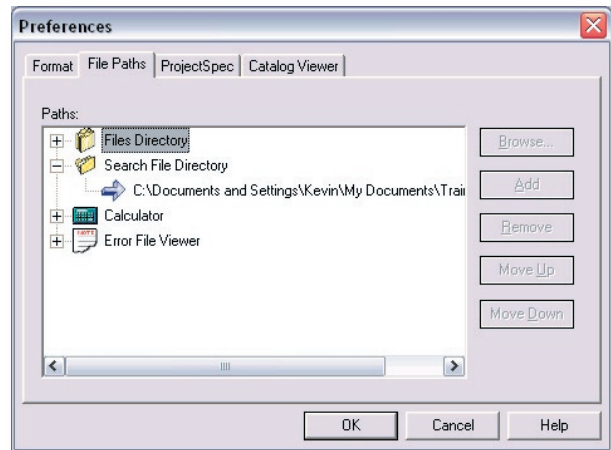
The Merge function inserts a reference to another existing SIF file into the active record. This is a great way to show your client how much a particular area is going to cost without having to show all the components that make up that area. Think of a merged SIF file as a one-line summary of the merged file. To ease the use of merged files and to properly update and expand them later, all SIF files to be merged should be in the same folder on the hard drive. SIF files can be merged into the active SIF file at any time.

1. Select the Merge icon.
2. Select the SIF file you want to merge.
3. Press the "Open" button.
4. Enter the quantity.

If you browsed to a different folder and selected a file you may be prompted to add this path to your File Search Paths. It is recommended that you select yes. This will help eliminate any problems you may experience when updating or expanding this merged file.

If multiple files with the same name exist in multiple Search File Directory paths, the expand merge command will expand the first file it comes across.

The icon to the left of the Part Description indicates this line item is in a Merged File.

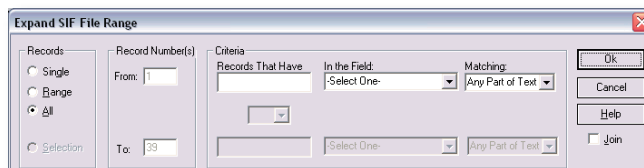


Rec#	Mfg	Qty	Part Number	Tag 1	Unit List	Extended	Weight	Extended
20		1	SAMPLE~1.SIF		7996.00	7996.00	0.00	0.00
<b>Part Description</b>				Tag 2			<b>Volume</b>	<b>Extended</b>
ACME BUILDING - SECOND STREET / REVISION 1 / 6-22-02				Tag 3			0.00	0.00
Option Codes							<b>Zone</b>	<b>Taxable</b>
								<input type="checkbox"/>

### Expand Merge

Expand Merge replaces the merged SIF file with the corresponding items from the SIF file with the quantities multiplied by the total quantity of each merged file. Additionally, the "File Directory" and "Search File Directory" in the Preferences dialog box defines the location where ProjectSpec will search for these merged SIF files.

1. Select the Expand Merge icon
2. Fill in your selection requirements.
3. Press the "OK" button.



## Selection Requirements

All through ProjectSpec and in this User Guide you will see Selection Requirements mentioned. Selection Requirements is a portion of a dialog box that is repeated many times. The Selection Requirements portion allows you to filter out records based on conditions that you may choose. This allows you to select all records or just any record that has a matching entry in a field.

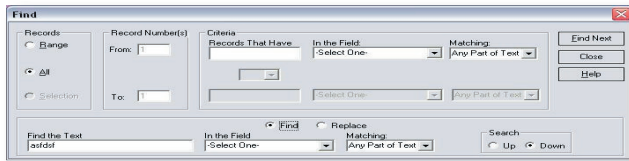


## Find and Replace

### Find

You can quickly search and find every occurrence of a word or phrase.

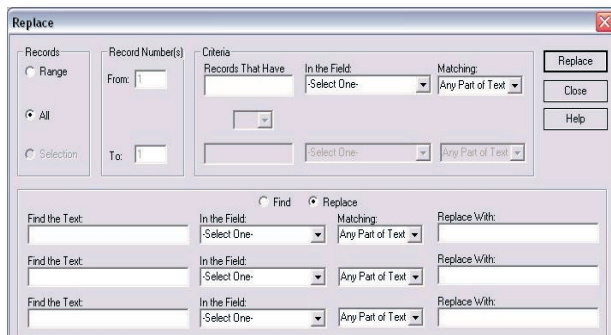
1. Select Edit/Find
2. Fill in your selection requirements.
3. In the "Find the Text" box, enter the text you want to find.
4. In the "In the Field" box, select which field you want to search in.
5. Press the "Find Next" button.



### Replace

You can quickly replace a word or phrase with a different word or phrase. A more powerful use of this command, and actually what the button depicts, is the ability to globally change panel heights. In this situation the replace command will be used more like a traditional "find and replace" command from other Windows based programs like Word.

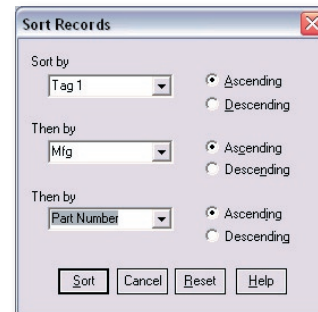
1. Select the Replace Icon.
2. Fill in your selection requirements.
3. In the "Find the Text" box, enter the text you want to find.
4. In the "In the Field" box, select which field you want to search in.
5. In the "Replace With" box, enter the replacement text
6. Press the "Replace" button.



## Sorting

Sorting a file will make it quicker and easier to select groups and find particular parts in larger files. You can sort by multiple fields inside of ProjectSpec. Below we will show one of the most common sort used.

1. Select the Sort Icon.
2. Select first field to sort by.
3. Then choose ascending or descending.
4. Repeat steps 2 and 3 for the remaining fields. For a total of three fields if needed.
5. Press the "Sort" button.



## Inserting Subtotals

You can insert Subtotals two ways, by field or by placing them manually. The subtotal is for all previous items to the previous subtotal or the beginning of the file, whichever occurs first. If done by field ProjectSpec will sort by the chosen field and then insert subtotals after each unique field. We will cover by field here.

1. Select Price/Subtotal/Insert by Field
2. Select field to arrange Subtotals by.
3. Press the "OK" button.


After the file is sorted ProjectSpec will automatically insert the new subtotals which can be viewed in the printout and on the screen. If you wish to remove the Subtotals that can be done just as easily. By going to Price/Subtotal/Remove Subtotals and this will remove all the subtotals.

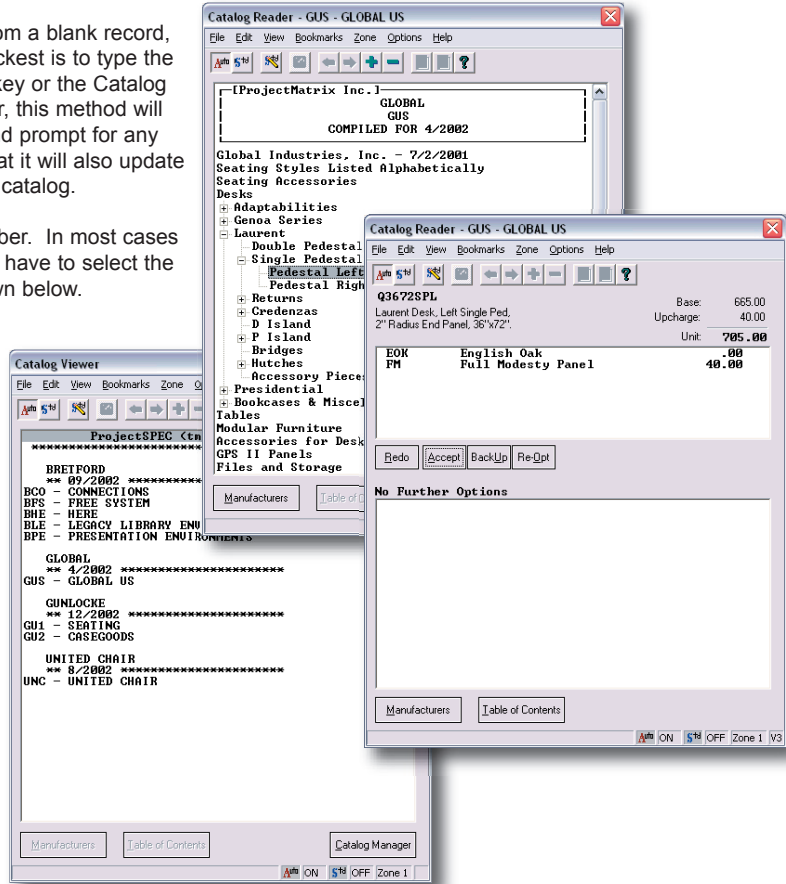
## Inserting Part Numbers

### Starting from Scratch

When you are inserting part numbers from scratch or from a blank record, there are a couple of ways to proceed. Typically the quickest is to type the part number in the Part Number field and press the F2 key or the Catalog Viewer icon on the toolbar. By using the Catalog Viewer, this method will check the part number, find the Manufacturer's code, and prompt for any missing option codes that part may need. Along with that it will also update the parts description and list price that was found in the catalog.


The above method only works if you know the part number. In most cases the correct part number may not be known, and you will have to select the part number from the catalog. This method will be shown below.

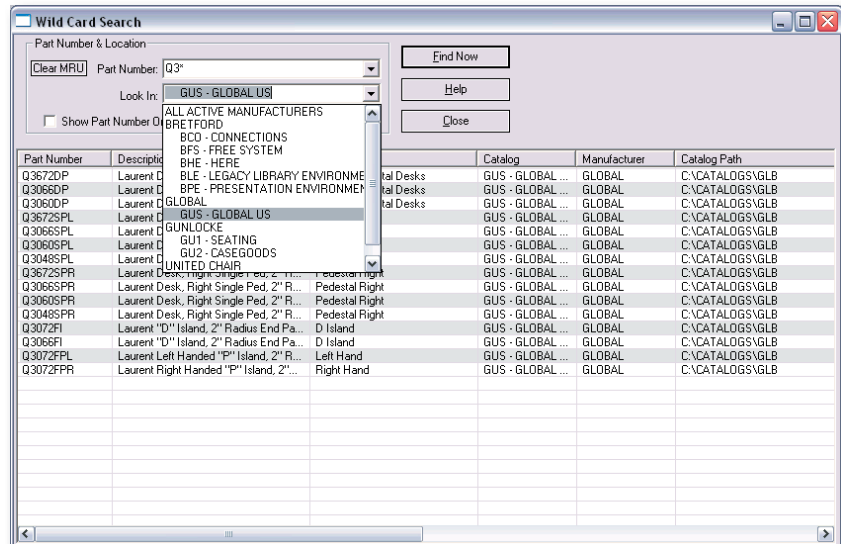
1. Select the Catalog Viewer icon or Press the F2 key. 
2. Double click on a Manufacturer's catalog. This list is from the active catalog list maintained in the Catalog Manager.
3. Click through the electronic catalog until you reach a part number. Notice as you make your selections the next choice is indented to the right.
4. When a list of part numbers appear choose the part that you were looking for. If the part desired is not found in this list, select the back arrow from the Catalog Viewer's toolbar. This will allow you to select a different path containing different parts.
5. After selecting the desired part number, ProjectSpec will prompt for options to that part, if it contains them and will continue to prompt until all options are chosen.
6. Press the "Accept" button when complete.
7. Enter the Quantity.



### Wild Card Search

Sometimes you may know part of a part number and can't find it in the catalog. If this is the case, you may have to do a wild card search. You can search all the active catalogs or just one catalog for that part.

1. Press the F2 key or select the Catalog Viewer Icon  from a blank record in ProjectSpec. This will bring up the Catalog Viewer screen.
2. Press the F2 Key again to begin the search command.
3. In the "Part Number" box, enter the portion of the part number that you know replacing the unknown with a "\*".
4. In the "Look In" box select a catalog or a Manufacturer or select "All Active Manufacturers".
5. Press the "Find Now" button.
6. Select the part number that meets your needs.



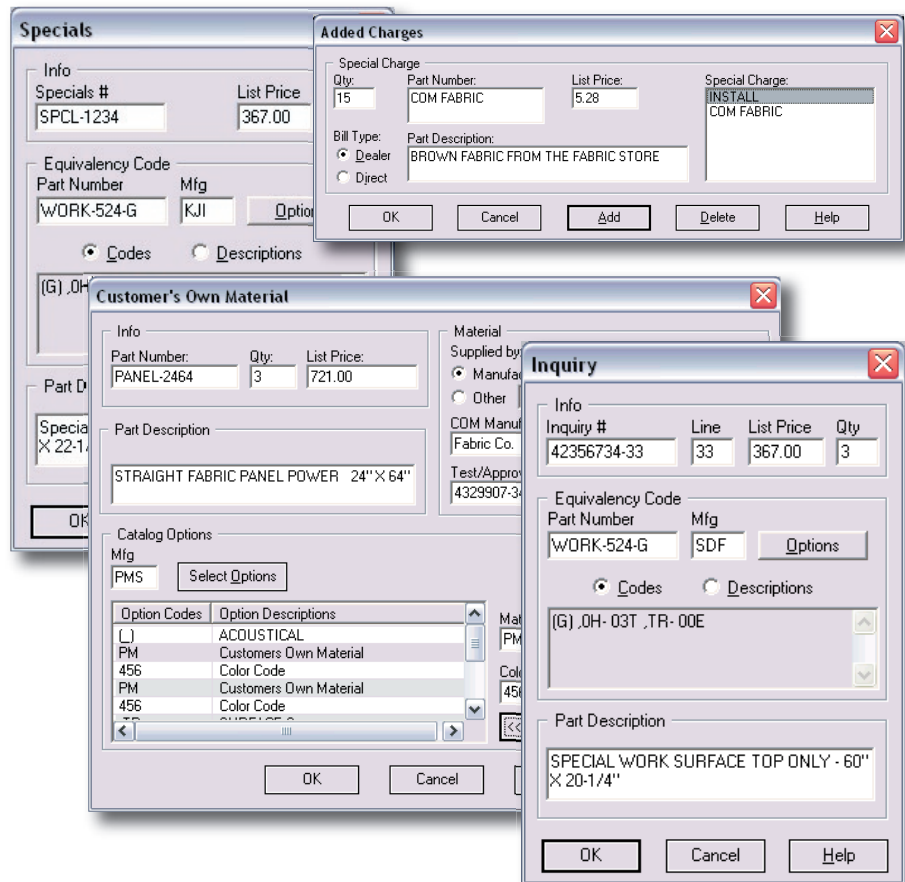
## Special MFG Codes

ProjectSpec has 4 reserved manufacturer codes that react differently when accessed with the Catalog viewer (F2 key). The first of these codes is **SPC**. **SPC** is used to communicate “specials” within ProjectSpec. Most manufacturers refer to these as “standard specials” which means the requirements can be communicated without a drawing

The next of these codes is **INQ**. **INQ** is used to communicate “inquiries” within ProjectSpec. Most manufacturers refer to these as “special specials” which means the requirements cannot be communicated without a referencing drawing. Many manufacturers will issue a confirming Inquiry Number with a referencing Line Item.


The next of these codes is **CHG**. **CHG** is used to communicate miscellaneous charges within ProjectSpec. These charges can include COM fabric, installation or other service fees that need to be a line item.


The last of these codes is **COM**. **COM** is used to communicate “customer’s own material” within ProjectSpec. Most manufacturers have specific formats required to correctly communicate COM. This dialog box is supplied as a guide only. The COM dialog is usually launched after a part has been specified with the appropriate grade of fabric for that manufacturer. The selected fabric and color is then converted to a COM.





## Status Icons


The status icons are meant to be a quick graphical status of each record line. Each icon has its own rules and conditions that must be met for it to appear. This allows the user to sort or search for different common conditions within a file. Each icon will be covered below.


 **Incomplete:** When this icon appears it means that there is missing data that is required, such as a part number or quantity, list price or options.


 **Error:** This icon will appear if there is an error on the record. The error message should appear in the description field.


 **Manual Override:** This icon represents that a status was changed by the user, which can be done by clicking on an error or an incomplete icon.


 **Complete:** This icon shows up if the record is complete. Completion is based on very general rules. Must have a part number and a price. Options are only included if added from the Catalog viewer.

 **Merged file:** This icon shows that a merged file is present and has not been expanded.

 **Added Charge (CHG):** This icon represents lines that contain the CHG code in the manufacturer’s field.

 **Customer’s Own Material (COM):** This icon represents lines that contain the COM code in the manufacturer’s field.

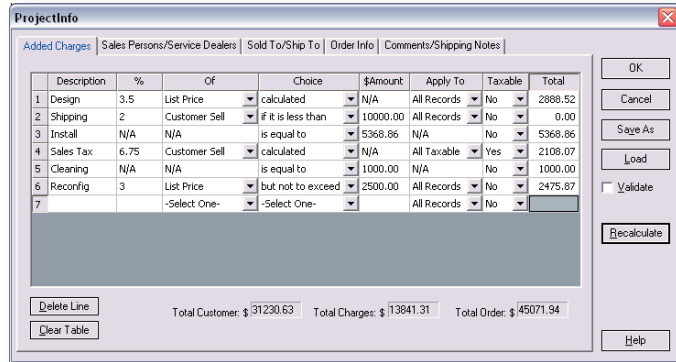
 **Inquiries (INQ):** This icon represents lines that contain the INQ code in the manufacturer’s field.

 **Specials (SPC):** This icon represents lines that contain the SPC code in the manufacturer’s field.



## ProjectInfo

ProjectInfo tracks many non-furniture specific aspects of a total project. This will allow you to calculate additional charges, generate people trails, identify servicing dealers, and enter order information including front notes and shipping notes.



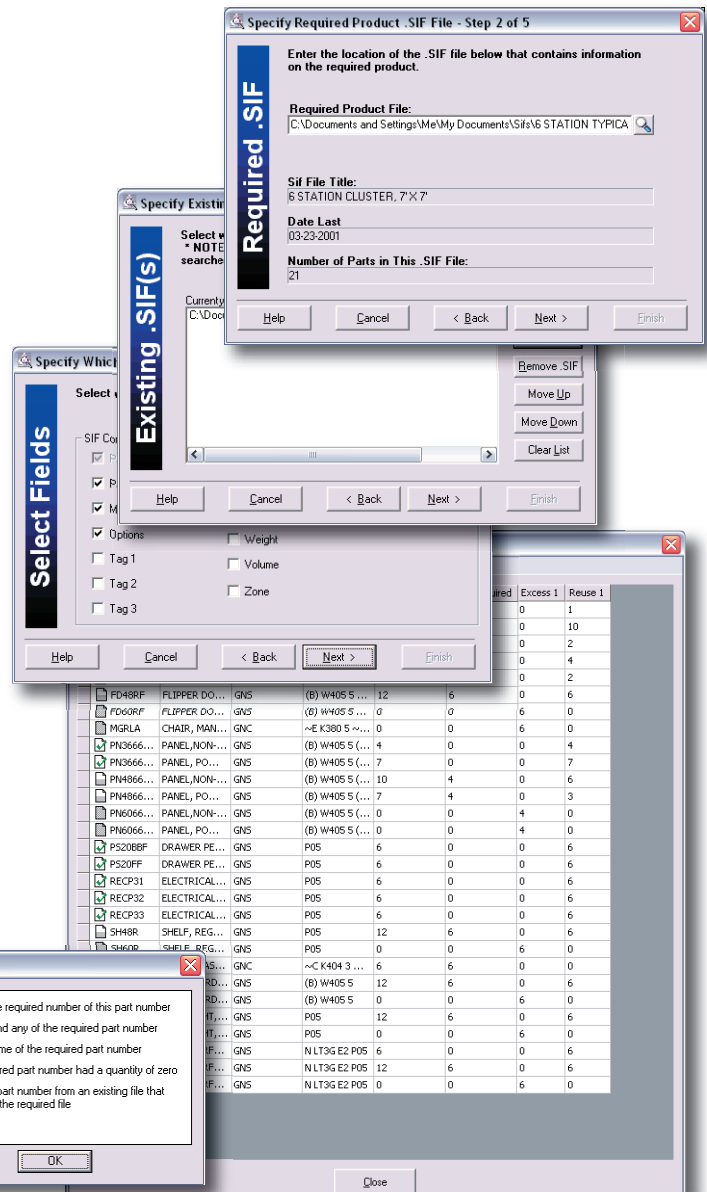
## ProjectAnalysis

ProjectAnalysis is a program separate from ProjectSpec. Its purpose is to allow ProjectSpec users to perform “what if?” scenarios comparing lists of existing product to a list of total product required. The most common use of ProjectAnalysis is to compare the contents of a SIF file generated from an AutoCAD drawing of a proposed reconfiguration against the SIF files of the existing layout and any parts that may be in stock. ProjectAnalysis may also be used for other varied purposes including comparing one layout to another, checking new orders against stock, etc.

ProjectAnalysis allows you to compare the SIF file of the Total Parts Required to Assemble a New Layout to as many as 10 other SIF files containing existing inventory. The resulting SIF files detail: 1) what parts can be reused from each existing location, 2) what parts from each existing location will not be used and will be in excess and 3) the net product that is required, not available in Total Quantity and must be ordered as new.

You should always perform a manual comparison of the new product required to the excess product available, as there may be specific design changes that can be implemented, which will result in reduced excess product and fewer new products being required. The net affect of this is fewer parts in inventory and a happier customer. Examples of design changes include the use of excess powered panels for required non-powered panels (or vice versa by adding in-expensive power kits) or for example combining multiple narrower width components for a larger one and using two 36” worksurfaces instead of one 72” surface.

After comparing the list of required parts to the list(s) of parts on hand, ProjectAnalysis generates a detailed spreadsheet-style report of the compared results. This report tells you if the required parts were found, where they were found, how many of each were found, what parts will be left over and what parts are needed that weren't found in any existing inventory parts list. Along with this report, SIF files are generated that break down the compared results.



## Custom Layout Setup

### Templates Explained

The Custom Layout Setup allows the user to select print templates. A print template defines where and what objects get printed. ProjectSpec ships with a limited number of predefined templates. The user has the ability to create as many templates as they feel they need.

ProjectSpec Print can be broken down into three sections: Cover Page, Main Page and Summary Page. Each of these are represented by a picture in this dialog box. The first on the left is the Cover Page. The cover page contains customer and dealer information pertaining to the project. The Middle one or the Main Page is where the items are broken down. This section typically is multiple pages. The last page is the Summary Page. This page gives a summary of all charges and any extended information.

### Selecting a Template

Templates define what will be printed from ProjectSpec. This is done from the Custom Page Layout dialog box. This box is shown below.

Below each picture is a check box. This check box allows the user to turn off that selection so it would not be printable. If you do not need a Cover Page, it is simple to uncheck, allowing you to print just the Main Page and the Summary Page. Below each check box is another field that allows the user to select which template is used for each section. Below are step by step instructions for loading a new template.

1. Go to File/Custom Page Layout. The pop up screen pictured below appears.
2. Select the small button to the right of the template that you wish to change.
3. Browse to the template that you wish to open and select it.
4. Press Open.

Your selected template will now be listed in the box provided.

### Creating Template Groups

You can also create groups of templates. This is done by selecting your templates (as shown in the "Selecting a Template") and pressing the "Save Group" button. You will then be prompted for a name of the group. Choose a name and press "Save". This group can be recalled quickly by selecting "Load group" at any time. This allows you to load three templates very quickly.

### Setting Default Templates

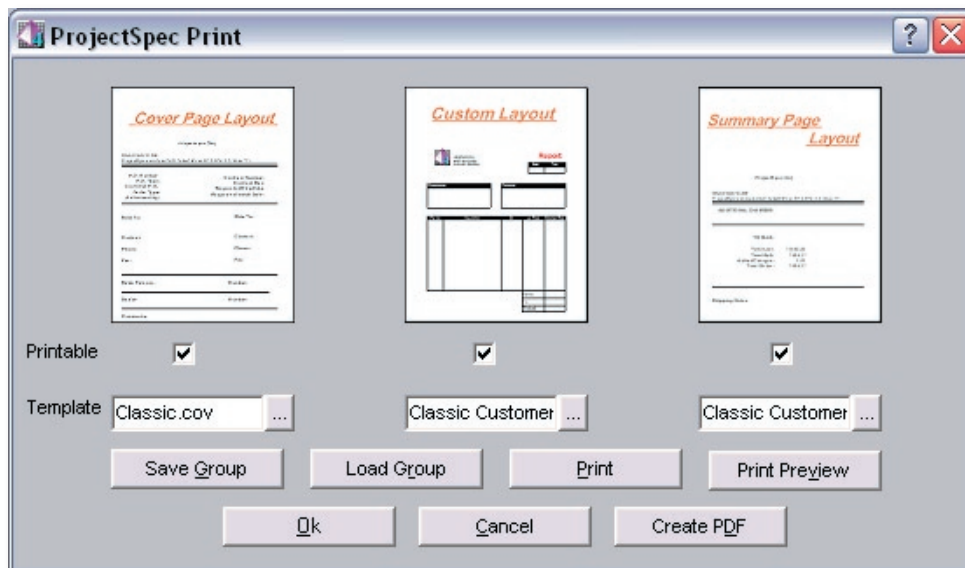
To set a template as your default, select your template or group as mentioned above. Then press the "OK" button. This will close this dialog box and return you to ProjectSpec. The next time you enter this box either by pressing the Print button or by going to Custom Layout Setup, your default will be remembered.

### Creating A PDF File

You also have the option of creating a PDF file from Custom Layout Setup. PDF's are a great way to email a SIF file to a client. It allows them to print out the file with the formatting that you designed.

To create a PDF file you will need Adobe Acrobat Reader. This is available free on Adobe's web site ([www.adobe.com](http://www.adobe.com)).

Choose the templates that you wish to use or select a group that you have created from within Custom Layout Setup. Once the templates are selected, press the "Create PDF" button. Select the name and location of the PDF file and press save. The PDF will be created and then opened in Acrobat Reader. You are now ready to send this new file to any client so that they can print their own copy of your file. There is no longer any need to rely on a bad FAX to complete your sale.



## Custom Layout Setup Cont.

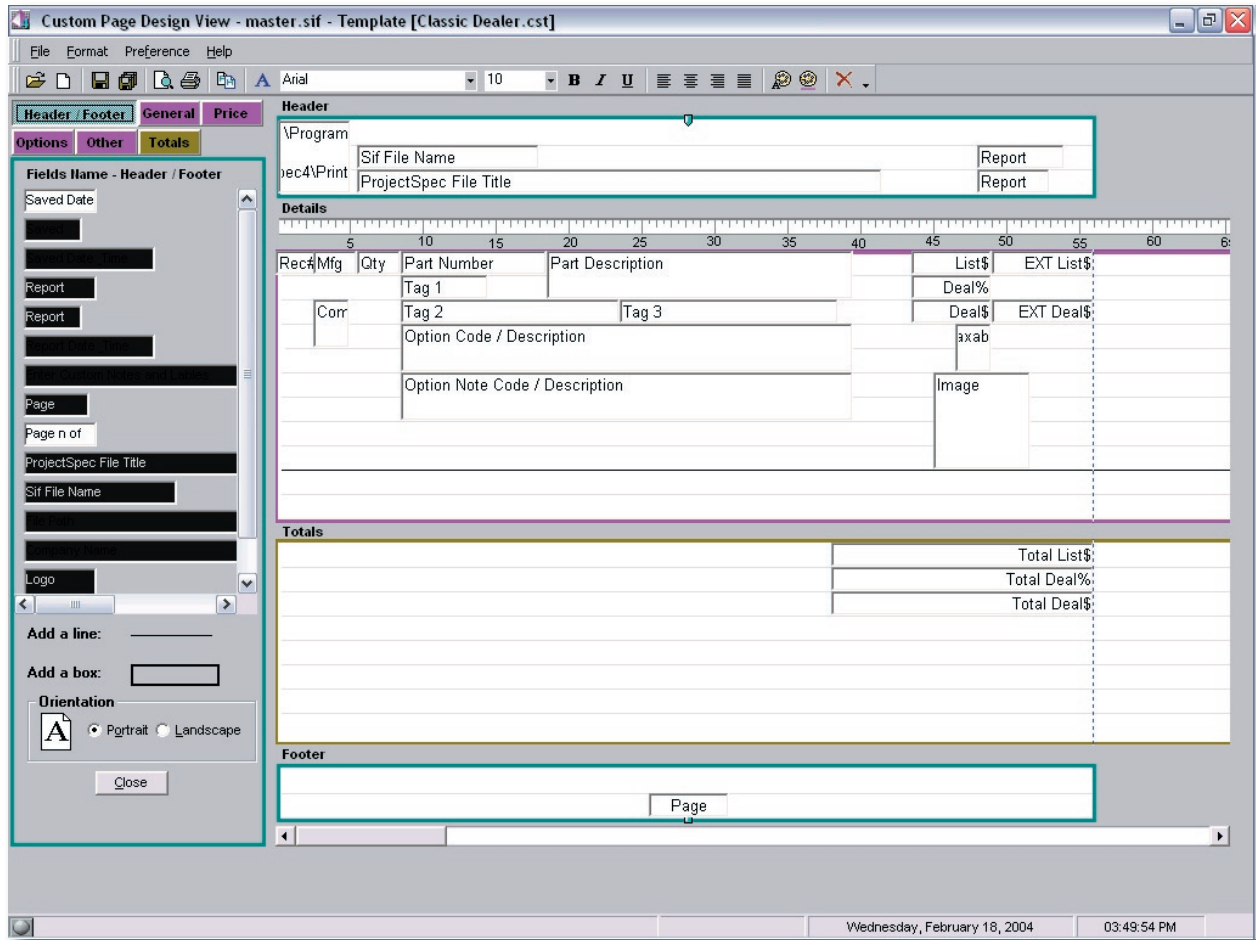
### Editing a Template

To edit a template, go to File/Custom Layout Setup and select the template that you wish to edit. Click on the picture above the template in the Custom Page Design View dialog box. All three sections of the print are modified separately.

Modify the template in the edit screen (pictured below). On the right is the template layout selection showing the location and objects that will be printed. In the upper left hand corner below the menu bar is the object tool box. Each colored box corresponds to the location where its' contents can be placed. If an object is placed in the template, its' corresponding object in the box will be grayed out. To add a new object to the template, simply drag that object to the template and place in the desired location. Objects can only be placed if they are GREEN in the desired location. Objects cannot be placed on top of each other or in a section where they are not intended to go (i.e. Part Numbers can not be placed in the header).

Sometimes it may be necessary to do a print preview to see how your changes affected the layout. This can be done from the tool bar or from File/Print Preview. When you have finished viewing the preview, simply close the preview and you will return to the edit screen.

When you have finished modifying the template, you will need to save your changes. You have two options here as well. You can save the file to the same name or save this modified template with a new name. It is recommended that you create multiple templates for a variety of situations. This way you will not have to modify a template every time you need to change a pricing field or any of the myriad of options.



## Printing In ProjectSpec

### Creating A Report

When it comes to generating a report you have tons of options in ProjectSpec 4. Don't let all these options scare you. They can be broken down into very simple questions. Below we will walk you through printing a report and all the questions that you need to ask your self.

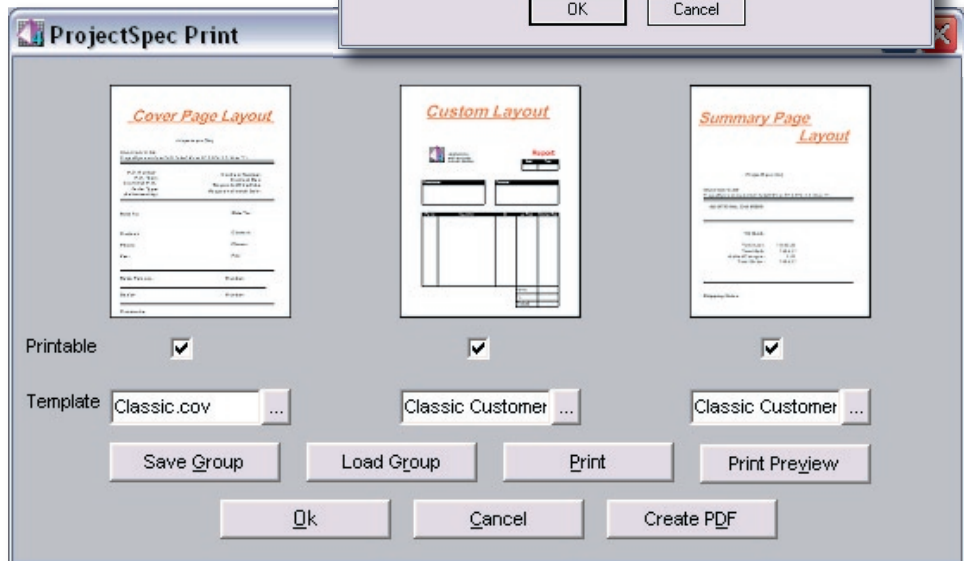
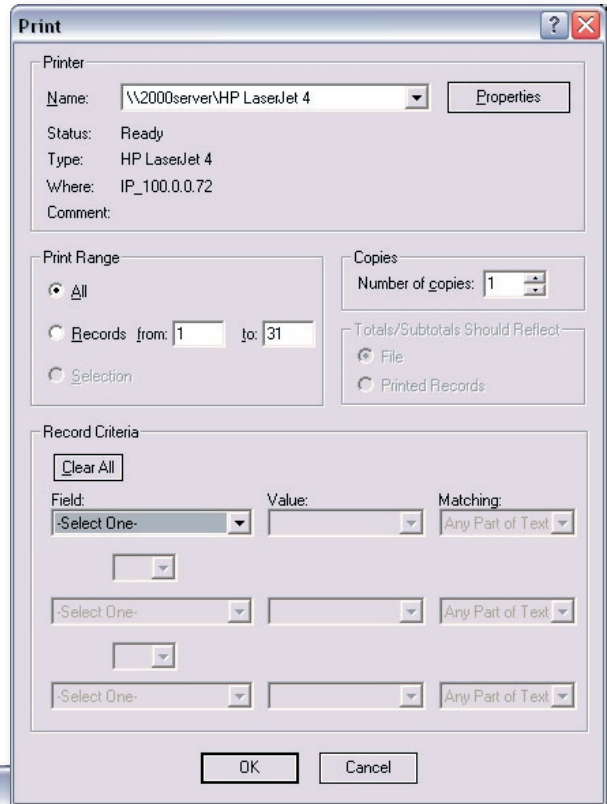
With the file open at you want to print go to File/Print. This will bring up the print dialog box. In this box we will set where and what will be printed. Below are step by step directions for generating a report from ProjectSpec.

1. **Printer:** Select the desired printer for output. If you are including picture in your report you may want to select a color printer.
2. **Print Range:** In this section you have three choices; ALL, Records from A to Z (Print Range), or Selection. Here we will control what records to print.
3. **Copies:** How many copies of this report are needed?
4. **Totals/Subtotals Should Reflect:** This section is only available if you selected a record range or Selection in the Print Range. How do you want your Totals and Subtotals to be calculated? File (All Records) will print the exact number from your ProjectSpec screen. Printed Records will recalculate the Totals and Subtotals to match your printed records.
5. **Record Criteria:** Of the selected print range what records you want to print. This section will allow you to filter your selected print range one more step. From the field section you can select to print just one MFG code or a group of codes.

NOTE: The small box between fields allows you say that either both fields have to be in one (The "AND" option) record or that one or the other has to match the record (The "OR" option).

6. Press OK to continue to the next step. Now the Custom Layout Dialog box appears.
7. Select the templates or group of template that you want to use for this report. When complete select Print to Print this report or Print Preview to view your selected report or the third option Create PDF to generate a PDF to send.
8. After selecting your output format click "Cancel" to return to ProjectSpec.

With the combination of Print Criteria and Templates you can generate an endless supply of reports and documents.



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