TEMPLATE USE INSTRUCTIONS

1. SETUP REQUIREMENTS

- See https://www.winnipeg.ca/matmgt/templates/files/Word_Setup_Requirements.pdf

2. NOTE

- All instructions are based on a right-handed mouse. "Click" means click the left mouse button unless otherwise specified.

- Do not change or alter the templates (.dot). Make changes only in the documents (.doc).

- Do not add or delete Section Breaks to the documents.

- Do not use **FILE** > **PAGE SETUP**; this may change settings for the whole document or create Section Breaks.

- Do not delete Bookmark brackets **[ ]**; they will not print unless selected in Print options.

- Hidden text should not be deleted unless the entire clause, version or text to which it applies is being deleted. It will not print unless selected in Print options and, in some cases, is used to include formatting code.
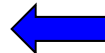
3. PREPARING THE BID SOLICITATION DOCUMENT

- Open the template as a document.

- Ensure that you have a current template. The template version is shown in the Header and in **FILE** > **PROPERTIES** >Advanced Properties> **CUSTOM**.tab
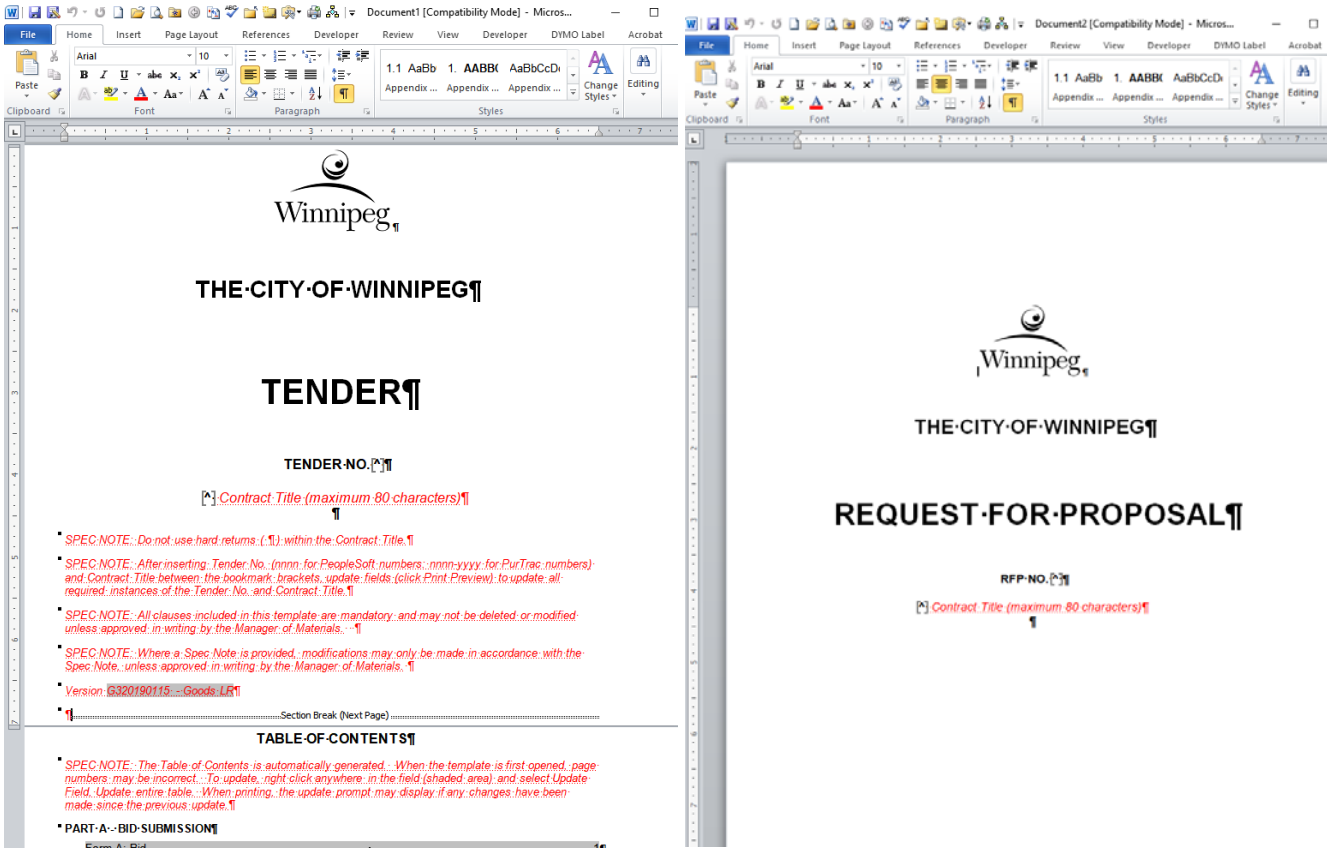
The·City·of·Winnipeg
Tender·No. ·^·¶
¶
Template·Version: G320190115·-·Goods·LR¶

- **SAVE AS** a document under a new name.

- Edit the document in **NORMAL VIEW** with Style area displayed, or **PRINT VIEW** with Styles and Formatting taskbar shown. Toggle **SHOW/HIDE ¶** to Show Hidden text and Formatting marks.

TEMPLATE USE INSTRUCTIONS

- Press **Ctrl** + **Home** to go to the beginning of the document.

- Use **Edit** > **Find**, **Find what: ^**, or use the **Alt** + **J** search macro to jump to the first insertion point (i.e., Bid Opportunity No.) and to browse by required keyboard entries. After the first use of either method, the **Next FIND/Go To** buttons at the lower right corner of the Word window; (see below) perform the same function.
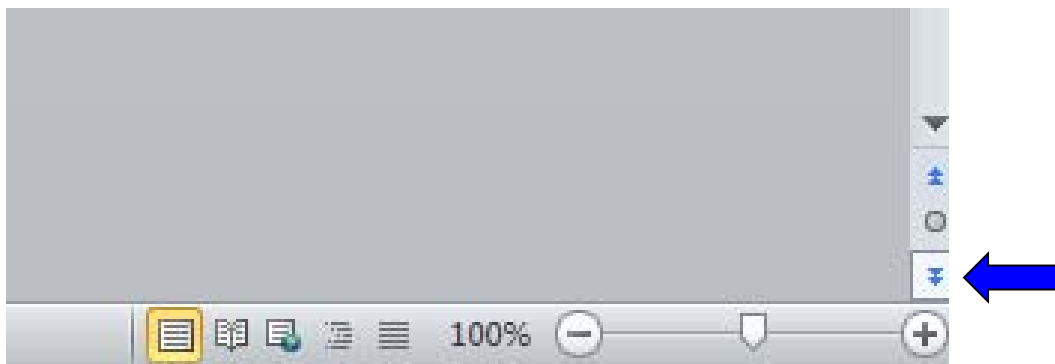
TEMPLATE USE INSTRUCTIONS

- Enter the Bid Opportunity No. ^ and the Project Title ^ over top of the ^ (hat)

- Click **PRINT PREVIEW** on your Quick Access Toolbar to update fields/ Or File Print. All points in the document that require the Bid Opportunity No. or the Project Title will be updated.

> **Tip**:   To update a single field code or cross-reference, select the field code and press **F9**, or right click anywhere in the shaded area and then select **UPDATE FIELD**.
>
> **Note:** At any time, you can use **PRINT PREVIEW** to update all codes, bookmarks and references, including those in the header. See <u>Known Issues</u> at the end of this document.

- Press **ALT + J** or click **FIND/GO TO** to jump to each of the next series of insertion points and make all required keyboard entries.

- Proceed through the document choosing appropriate versions of forms and clauses and making required entries.

- Delete all unnecessary forms and clauses.

> **Tip**:   When deleting an unnecessary clause, ensure that the paragraph marker (¶) is also deleted. Ensure that Section breaks (⸺Section Break (Next Page)⸺) are not deleted.
>
> **Tip**:   If you notice an undesired result immediately following a deletion, don't panic use **Undo** to restore the document. Some Word commands are actually multi-step routines. **Undo** may only undo part of the change and may need to be clicked two or more times to fully restore the document.
>
> **Tip**:   Save the document often, especially after successful major editing and before deleting pages or using features with which you are not comfortable.

- Run **SPELLING** and check the document.

- Click **PRINT PREVIEW** to update all codes, bookmarks and references, including those in the header.

- Right click the Table of Contents and select **UPDATE FIELD**, **UPDATE ENTIRE TABLE**. Review the Table of Contents for errors. Missing or extraneous references, or error messages, indicate incorrect application of Styles in the body of the document.

> **Tip:**   In **PRINT PREVIEW** (print hidden text not selected) or with the view zoom set to full page and **SHOW/HIDE ¶** toggled to hide, check the document page by page reviewing page formatting and checking for widowed or orphaned paragraphs/lines and page breaks.
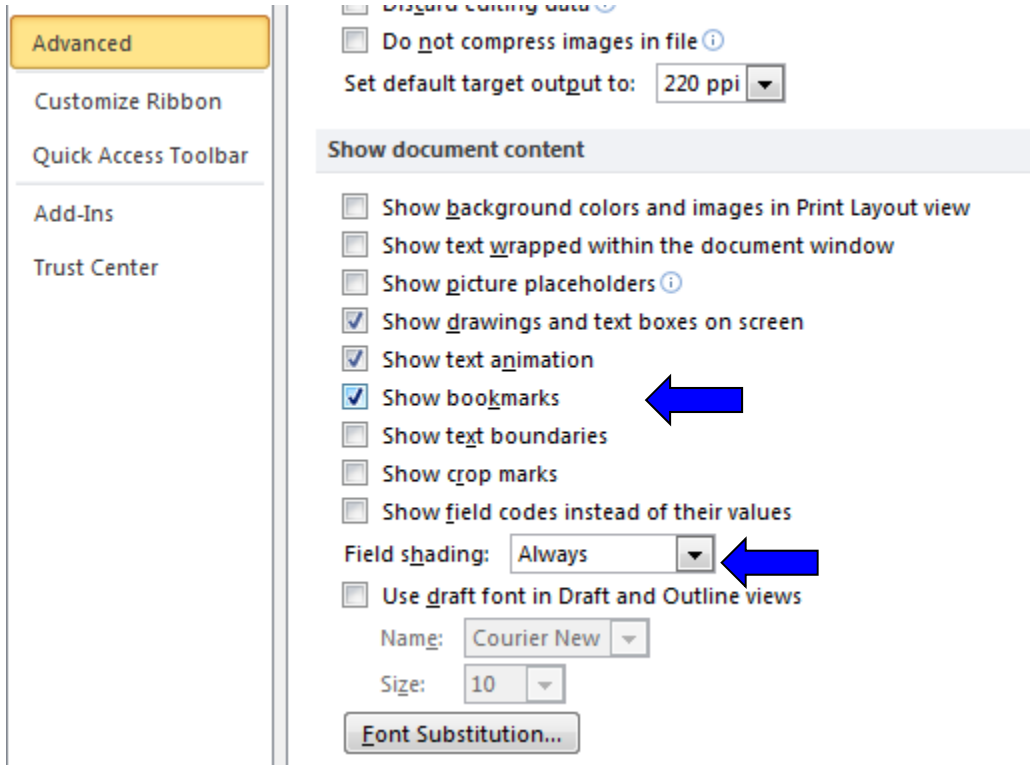>
> **Tip**:   Search for the text "**error!**" to locate cross-references that have lost their associated reference.

- Save the document.

- Print the document to Adobe PDF.

4. PREPARING AN ADDENDUM

- Save a copy of the Final Bid Opportunity document under a new name, using the proper naming convention e.g., ####-YYYY_Addendum_#_Bid_Submission or ####-YYYY_Addendum_#.

- On the front cover page of the renamed Bid Opportunity, revise the Bid Opportunity No. by adding " Addendum_#" (# = the addendum number). Ensure that the text is within the Bookmark brackets. To View the Bookmark Brackets go to File>Options>Advanced.

    - And check off the Show bookmarks and Under Field Shading select Always, this will allow you to easily find all of the cross references in the document.

TEMPLATE USE INSTRUCTIONS

- Click **Print Preview** to update fields. All points in the document that require the Bid Opportunity No. will be updated.

The City of Winnipeg
Bid Opportunity No. 567-2015 ADDENDUM 1
Template Version:

- Revise content as necessary.
- Finalize and save the document as per the naming convention.
- Print the entire document to Adobe PDF.
- Prepare an Addendum Summary using the appropriate Addendum template.
- **FORM B:PRICES changed in an ADDENDUM**
    - Revise content of the Form B prices as follows: e.g, **Form B (R1): Prices**

FORM B(R1: PRICES
(See B9)
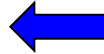
SUPPLY AND DELIVERY OF LIBRARY SUPPLIES

UNIT PRICES

ITEM NO.	DESCRIPTION	SPEC. REF. Brodart Company Website: brodart.ca	UNIT	APPROX. ANNUAL QUANTITY	UNIT PRICE	Discount Off (in %)	AMOUNT
1.	Acrylic Slatwall Magazine Holder, various sizes and shapes	#81666001	Each	6			
2.	Acrylic Slatwall Pamphlet Holders, various sizes and shapes	#87144001	Each	8			
3.	Acrylic standing sign holders	#81618001	Each	15			
4.	Adjustable book display easels, various sizes	#28866101	Each	12			
5.	Book carts, 3 flat shelves, heavy duty	#71014000	Each	4			

TEMPLATE USE INSTRUCTIONS

KNOWN ISSUES:

GENERAL

THE TEMPLATE DOESN'T WORK PROPERLY.

Cause: The workstation and/or Word have not been configured correctly.

Solution: See Word_20XX_Set-up_Requirements.pdf. Ensure all requirements are in place.

Cause: The document is being worked upon as a Word template (*.dot/). This may not be obvious if **Hide extensions for known file types** has been selected in Windows Explorer or the extension has been improperly changed.

Solution: Open and save the template as a Word document (*.doc/docx). Use **Save as type: Word document (*.docx)**. Do not just change the filename extension.

File name:	Bid_Opportunity-Construction.doc
Save as type:	Word Document (*.doc)
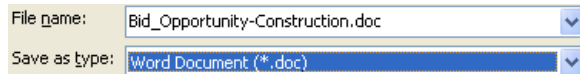
THE PROJECT TITLE IS NOT FORMATTED PROPERLY IN THE FORMS AND CLAUSE B1.

Cause: If a paragraph marker / hard return (¶) is entered within the Bookmark on the front page of the document, the appearance of fields that target the Bookmark will be affected by the paragraph format contained in the hard return.

Solution: Do not use hard returns in the Project Title on the front page of the Bid Opportunity. If a title must be divided into parts, use a hyphen (-) or a Text wrapping break. (↵).

THE BID OPPORTUNITY NO. / PROJECT TITLE IS NOT DISPLAYED/IS ONLY PARTIALLY DISPLAYED IN THE FORMS AND CLAUSE B1.

Cause: The Bid Opportunity No. / Project Title is **NOT** (entirely) within the Bookmarks **[ ]** on the front page of the document.

Solution: Ensure that Word settings allow you to see the Bookmark brackets. Re-enter the information within the Bookmarks.

FIELD CODES DO NOT UPDATE CORRECTLY AFTER USING PRINT PREVIEW.

Cause: Word updates field codes sequentially (the sequence appears to differ in older versions of Word). If a field code requires information from another field code, it may use the saved result of a previous update. Another iteration may be required for all codes to be correct.

Solution: Repeat **Print Preview** .

TEMPLATE USE INSTRUCTIONS

TABLE OF CONTENTS

IN THE TABLE OF CONTENTS, THE PAGE NUMBERS ARE INCORRECT.

Cause: The Table of Contents may need to be updated after other Field codes (especially page numbers in the Headers) are updated.

Solution: If **Update Fields** is selected in the Printing options, the Table of Contents will update when printed (but may show the following dialog box). To manually update, right click the Table of Contents and select **Update Field**, **Update entire table**.

Cause: The Table of Contents may display the page numbers with Hidden text displayed, differing from a printed copy (hardcopy or Adobe PDF) without Hidden text, or vice versa.

Solution: Update the Table of Contents.

IN THE TABLE OF CONTENTS, SOME CLAUSES AND/OR FORMS ARE MISSING AND/OR SOME EXTRANEOUS ITEMS ARE LISTED.

Cause: The Table of Contents lists only specific Styles.

Solution: Apply the correct Styles in the body of the document. Do not try to correct the Table of Contents.

IN THE TABLE OF CONTENTS, SOME ENTRIES ARE ALL UPPERCASE / ALL LOWERCASE / MIXED CASE / REVERSE MIXED CASE.

Cause: The Table of Contents displays the text from other parts of the document. The Styles which are listed, e.g., CLAUSEHEADING, FORMHEADING, etc., often include **All caps** as a property and incorrectly keyboarded text may not be apparent at the entry point.

Solution: Keyboard new text for CLAUSEHEADINGS, etc. in Mixed Case and disregarding the UPPERCASE appearance.

OR

Keyboard new text in Mixed Case using Normal Style and apply the correct Style afterwards.

Do not try to correct the Table of Contents.

TEMPLATE USE INSTRUCTIONS

HEADERS & FOOTERS

IN THE HEADERS, "PAGE X OF Y" DISPLAYS OR PRINTS AS "PAGE 1 OF 1", "PAGE 2 OF 2", "PAGE 3 OF 3", … "PAGE Y OF Y".

Note: Symptoms may vary, e.g., only some pages may be incorrect, or the pages may be numbered incorrectly only at some times.

Cause: **Background printing** is enabled.

Solution: In **Tools** > **Options** > **Print**, ensure that options are set correctly:

Select **Update fields**.

Deselect **Background printing**.

Print.

Cause: Print file exceeds available computer or printer cache.

Solution: Correct system resource issue.

OR

In **Tools** > **Options** > **Print**, deselect **Update fields**.

Toggle **Show/Hide ¶** on the Standard toolbar to hide Hidden text and Formatting marks.

Update fields manually using **Print Preview** .

Check the Table of Contents. If necessary, manually update separately by right clicking the Table of Contents and selecting **Update Field**, **Update entire table**.

Save the file.

Print.

THE HEADER DOES NOT CORRECTLY IDENTIFY THE PART, E.G., THE HEADER FOR THE FORMS IN BID SUBMISSION HAS DISAPPEARED OR SHOWS AS "BIDDING PROCEDURES".

Note: Page numbering and number of pages may also be incorrect in the header and/or in the Table of Contents (this symptom may not be displayed if field codes have not been updated).

Cause: One or more Section breaks have been added or deleted.

Solution: Restore deleted Section breaks.

Delete extraneous Section breaks.

Correct headers using a correct document as a guide. OR Copy the entire contents of the header from the corresponding part of a new document produced from the same template.

Cause: Manual changes have been to the header. Custom entries have been added to the header.

Solution: Copy the entire contents of the header from the corresponding part of a new document produced from the same template.

Notations such as "DRAFT", the revision date or the filename/path should not be entered in the header. The footer has been reserved for such non-standard entries.

TEMPLATE USE INSTRUCTIONS

PRINTING

PRINTING PART OF A DOCUMENT DOES NOT PRINT THE CORRECT PAGE(S).

Cause: Hidden text is displayed but not selected for printing. Pages therefore re-paginate when printing.

Solution: Select pages to be printed while in **Print Preview** or with **Show/Hide ¶** on the Standard toolbar toggled to hide Hidden text and Formatting marks.

Cause: Page number(s) and/or page range(s) do not specify section(s).

Solution: Specify ranges using the correct syntax (see following examples).

▼ A range of pages within a section

Type **p** *page number* **s** *section number*.

For example, to print pages 5 through 7 in section 3, type **p5s3-p7s3**

▼ An entire section

Type **s** *section number*.

For example, type **s3**

▼ Noncontiguous sections
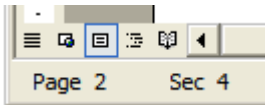
Type the section numbers with commas between them.

For example, type **s3,s5**

▼ A range of pages across sections

Type a range of page numbers and the sections that contain them with a hyphen between the starting and ending numbers in the range.

For example, type **p2s2-p3s5**

The page and section are displayed on the lower left corner of the Status bar.

Page 2   Sec 4

PART OF A DOCUMENT DOES NOT PRINT.

Cause: Hidden text is displayed but not selected for printing. Applying formats incorrectly can cause the text to appear to be a standard Style which should print but retain the hidden text property.
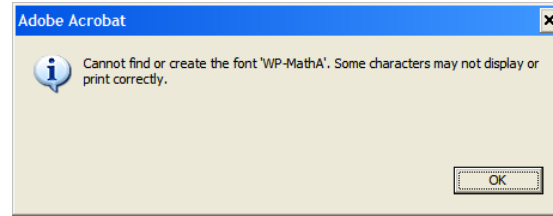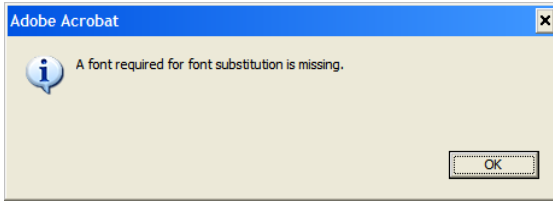
Solution: Use **Format Painter** to apply the correct Style.

OR

Use **Clear Formatting** and then apply the correct Style.

TEMPLATE USE INSTRUCTIONS

PRINTING TO OR READING AN ADOBE ACROBAT (PDF) DOCUMENT RESULTS IN ERROR MESSAGES, E.G.:

Note: The problem may only be evident on some workstations. Visible symptoms in the document include the unknown character symbol (Î) or an inappropriate character, e.g., " 30Σ C " instead of " 30° C ".

Cause: The source (Word) document contains a font (often a special symbol or character) that is not available on the workstation and has not been embedded in the PDF document. The problem may not be apparent when the Word document and/or the PDF are viewed on a workstation that happens to have the font available.

Solution: Use only the base fonts, characters or symbols that are available in a standard Microsoft Office Word installation. **Do not copy content from non-Microsoft applications**.

CHANGES TO MY DOCUMENT DID NOT PRINT.

Cause: Track Changes is enabled and the Original version is being printed.

Note: The Status bar indicates if Track Changes is enabled.
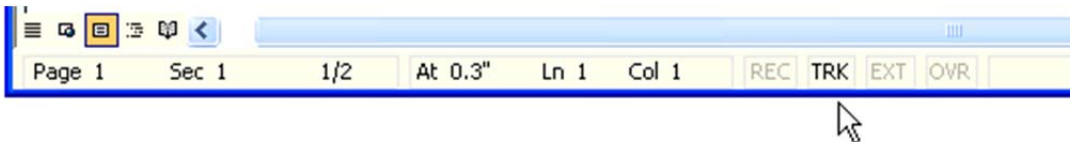
Solution: Ensure that the Final version is displayed and selected for printing.