Summary of Comments on PowerPoint Presentation

Page: 1

Author: Brian Raecke (Brian.Raecke@state.sd.us) Subject: Highlight Date: 01/14/2014 3:53:43 PM
Replace Text: Change "March 20, 2013" to January 10, 2014

USER GUIDE FOR ELECTRONIC PLANS REVIEW AND PDF DOCUMENT REQUIREMENTS FOR CONSULTANTS

South Dakota Department of Transportation
January 10, 2014

Page: 3

Author: Brian Raecke (Brian.Raecke@state.sd.us) Subject: Highlight Date: 01/15/2014 1:49:17 PM
Change Text Color to Red

Reason - To bring to the attention of the Consultants/SDDOT Designers that the PDF Document Properties and Procedures need to be followed. A number of plans have been sent out for review where the page numbers were inserted in the PDF document. If the document is 200 pages then there will be 200 comments before the review even begins. This makes it difficult to filter through the review comments with all of the page number comments mixed in.

What is a Shared Electronic Plan Review

SDDOT will be conducting the review of the plans by distributing a combined PDF of the plans for others to review. Multiple reviewers can add their comments to the PDF using commenting and markup tools at the same time. In shared reviews, reviewers can publish their comments to a shared network drive.

Security is set up on the comments so only the person making the comments can modify them. Acrobat synchronizes comments at regular intervals to download all the latest comments. Reviewers are notified of new comments as they are added, and they can see and reply to comments made by other reviewers.

PDF Document Properties and Procedures

The Consultant shall follow the properties and procedures set up for SDDOT electronic plans in the document below: http://www.sddot.com/business/design/docs/cadd/ElectronicPlans.pdf.

All PDF plans submitted to the SDDOT project manager to be reviewed shall be checked for existing comments. The existing comments may be page number changes etc. that were done in the PDF. If the above procedures cannot be followed the comments shall be removed by flattening the PDF by printing the PDF to a PDF.

The Consultant shall verify that these requirements have been met before sending the electronic plans to the SDDOT project manager. If the SDDOT project manager determines that the electronic plans have not met these requirements, than updated electronic plans shall be resubmitted by the Consultant.

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Author: Brian Raecke (Brian.Raecke@state.sd.us) Subject: Highlight Date: 01/16/2014 10:53:07 AM
Change Color of Text to Red

Reason - To bring to the attention of the Consultants, Project Managers and Designers that sending the reviewer an email when their comment is rejected is mandated by the Director of Planning & Engineering and the Director of Operations. Sending the reviewer an email with the reasons why their comment is rejected during the review period opens the door for communication. This communication will take place during the review period when there may be time to make design changes.

SDDOT Electronic Plan Procedures for Projects Completely Designed by a Consultant

1. Once proper electronic documents are submitted, the SDDOT project manager shall combine the separate PDF's into a single PDF and name the combined file to do a SDDOT electronic plans review.
2. If other entities would prefer to do a electronic review they can also get a copy of this file from the State FTP Server. Adobe Reader XI may be used to make comments on that file. See requirements for making comments on pages 6-21.
3. When the review is completed and if the project is a FHWA oversight project, the SDDOT project manager shall store FHWA's review file under the Review folder then merge FHWA's comments into the main review file.
4. If other entities have completed electronic reviews, the SDDOT project manager shall store each entity's review file under the Review folder then merge their review file PDF's into the main review file.
5. When the review is completed the SDDOT project manager will archive the review comments and send a copy of the archived PDF with the review comments to the Consultant using the State FTP server.
6. The Consultant shall respond to all review comments on the archived PDF. Adobe Reader XI may be used to make review responses. See requirements on making responses on pages 6-7. **Every comment shall have a "Reply" and a "Status"** (See Managing Comments pages 22-24 and Responses To Review Comments and Revisions page 25). When complete with the review responses the Consultant shall send the PDF with review responses back to the SDDOT project manager using the State FTP server. This file shall be correctly named (example - Brok02Q1_Consultant_response.pdf) and stored under the Review folder. **Any Consultant that rejects a comment shall e-mail the person that made the review comment and the SDDOT project manager with their justification/response to notify the reviewer.**
7. **The SDDOT project manager shall verify that all comments have been given a Reply and a Status and if the comment has been rejected an e-mail has been sent to the reviewer.**
8. When the final plans have been submitted, the SDDOT project manager will send a letter to Bid Letting. This letter shall be CC'd to all reviewers and have a link to the archive copy of the review PDF with review responses and a link to the final plans using the FTP Server. This will allow the Local Government Offices and other reviewers to have an opportunity to compare the review responses to the final plans to see if their comments were addressed at an early stage of the bid letting process.

SDDOT Electronic Plan Procedures for Projects Designed by a Consultant and SDDOT

1. Once proper electronic documents are submitted, the SDDOT project manager will combine the separate PDF's into a single PDF and name the combined file to do a SDDOT electronic plans review.
2. If other entities would prefer to do a electronic review they can also get a copy of this file from the State FTP Server. Adobe Reader XI may be used to make comments on that file. See requirements for making comments on pages 6-21.
3. When the review is completed and if the project is a FHWA oversight project, the SDDOT project manager shall store FHWA's review file under the Review folder then merge FHWA's comments into the main review file.
4. If other entities have completed electronic reviews, the SDDOT project manager shall store each entity's review file under the Review folder then merge their review file PDF's into the main review file.
5. The SDDOT project manager shall send the Consultant a copy of the review file with comments by using the FTP site. The copy sent to the Consultant shall be made by going to the upper left corner of the review file (File < Save as Archive Copy)(file name example - Brok02Q1_Consultant.pdf). The SDDOT project manager shall continue the review response process for the SDDOT Designers so that they can make review responses. The Consultant shall make review responses, that involve their design sections, on the review PDF with comments that was sent to them. Adobe Reader XI may be used to make review responses. See requirements on making responses on pages 6-7. **Every comment shall have a "Reply" and a "Status"** (See Managing Comments pages 22-24 and Responses To Review Comments and Revisions page 25) When complete with the review responses the Consultant shall send the PDF with their review responses back to the SDDOT project manager using the State FTP server. This file shall be correctly named (example - Brok02Q1_Consultant_response.pdf) and stored under the Review folder. **Any Consultant/SDDOT Designer that rejects a comment shall e-mail the person that made the review comment and the SDDOT project manager with their justification/response to notify the reviewer.**
6. The SDDOT project manager shall merge the Consultant review responses with the main review file. The SDDOT project manager's name will replace the Consultant's name in the review responses when the responses are merged.
7. **The SDDOT project manager shall verify that all comments have been given a Reply and a Status and if the comment has been rejected an e-mail has been sent to the reviewer.**
8. The review file shall be archived by the SDDOT project manager and stored under the Review folder. A copy of this archived file shall be sent to the Consultant using the FTP server.
9. When the final plans have been submitted the SDDOT project manager will send a letter to Bid Letting. This letter shall be CC'd to all reviewers and have a link to the archive copy of the review PDF with review responses and a link to the final plans using the FTP Server. This will allow the Local Government Offices and other reviewers have an opportunity to compare the review responses to the final plans to see if their comments were addressed at an early stage of the bid letting process.

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Author: Brian Raecke (Brian.Raecke@state.sd.us) Subject: Highlight Date: 01/16/2014 10:55:16 AM
Insert Text: "by using the FTP site. The copy sent to the Consultant shall be made by going to the upper left corner of the review file (File < Save as Archive Copy)"

Reason - Provided location where the Consultant file should be located and how that file should be saved.

Author: Brian Raecke (Brian.Raecke@state.sd.us) Subject: Highlight Date: 01/16/2014 10:54:12 AM
Replace Text: Change "will to "shall"

Reason - word change

Author: Brian Raecke (Brian.Raecke@state.sd.us) Subject: Highlight Date: 01/16/2014 10:56:43 AM
Insert Text: "The SDDOT project manager shall"

Reason - To clarify the requirements

Author: Brian Raecke (Brian.Raecke@state.sd.us) Subject: Highlight Date: 01/16/2014 10:57:15 AM
Insert Text: "that involve their design sections"

Reason - To clarify where the Consultants should be making comment responses.

Author: Brian Raecke (Brian.Raecke@state.sd.us) Subject: Highlight Date: 01/16/2014 10:57:39 AM
Insert Text: "review"

Reason - To clarify sentence

Author: Brian Raecke (Brian.Raecke@state.sd.us) Subject: Highlight Date: 01/16/2014 10:58:03 AM
Insert Text: "with comments"

Reason - To clarify the sentence.

Author: Brian Raecke (Brian.Raecke@state.sd.us) Subject: Highlight Date: 01/16/2014 10:58:22 AM
Replace Text: Change "involve their design sections" to "was sent to them"

Reason - To clarify the sentence.

Author: Brian Raecke (Brian.Raecke@state.sd.us) Subject: Highlight Date: 01/16/2014 10:59:03 AM
Change Color of Text to Red

Reason - To bring to the attention of the Consultants, Project Managers and Designers that sending the reviewer an email when their comment is rejected is mandated by the Director of Planning & Engineering and the Director of Operations. Sending the reviewer an email with the reasons why their comment is rejected during the review period opens the door for communication. This communication will take place during the review period when there may be time to make design changes.

Author: Brian Raecke (Brian.Raecke@state.sd.us) Subject: Highlight Date: 01/16/2014 10:59:35 AM
Change Color of Text to Red

Reason - To bring to the attention of the Consultants, Project Managers and Designers that sending the reviewer an email when their comment is rejected is mandated by the Director of Planning & Engineering and the Director of Operations. Sending the reviewer an email with the reasons why their comment is rejected during the review period opens the door for communication. This communication will take place during the review period when there may be time to make design changes.

COMMENTING (CONTINUED):

Group And Ungroup Markups

The reviewer shall group two or more markups so that your comments function as a single comment. You might group markups temporarily to move them to a new location or to modify their properties rather than editing each one individually. Grouping also helps the plan preparer to respond to your markups.
Note: You cannot group text edit markups.

Group Markups

1. Using the Select tool or the Hand tool, select a markup.
2. Ctrl-click/Command-click to select the markups you want to group.
3. Right-click within the selection, and choose Group.

Ungroup Markups

Right-click the grouped selection, and choose Ungroup.

Add Comments In A Text Box Or Callout

You can use the Text Box tool to create a box that contains text. You can position it anywhere on the page and adjust it to any size. A text box remains visible on the document page; it doesn't close like a pop-up note.
Another way to add a text box is simply to paste copied text into the PDF. Text font and size are based on the system default settings.
You can use the Callout tool to create a callout text box. Callout text boxes are especially useful when you want to single out—but not obscure—a particular area of a document. Callout text boxes have three parts: a text box, a knee line, and an end-point line. You can resize each part by dragging a handle. The knee line can be resized in one direction only; horizontal knee lines can be resized horizontally only; vertical knee lines can be resized vertically only. The text box expands vertically as you type so that all text remains visible.
You can move the text box itself or together with the end-point line. The text box moves around a stationary anchor point—the arrow on the end-point line—which is created when you first click in the PDF. You can modify the color and appearance of the text box and add arrows or leaders to the end-point line.

Note: When the reviewer uses the Text Box or the Callout Tool the Consultant/Designer can not reply to these comments as with other methods and are required to place a sticky note next to these comments in order to reply. It is recommended that the Text Box and the Callout Tool not be used unless there is no other option. Make sure when you use the Text Box or the Callout tool that you do not cover any details or notes with the text box. Move the text box to an empty space on the plan sheet.

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Author: Brian Raecke (Brian.Raecke@state.sd.us) Subject: Highlight Date: 01/16/2014 11:01:50 AM
Insert Text: "Note: When the reviewer uses the Text Box or the Callout Tool the Consultant/Designer can not reply to these comments as with other methods and are required to place a sticky note next to these comments in order to reply. It is recommended that the Text Box and the Callout Tool not be used unless there is no other option."

Reason - Adobe Acrobat/Reader does not allow "replies" to be completed on the Text Box and Callout commenting tools. This requires the Consultants/Designers to place a sticky note next to the Text Box/Callout Tool comments in order to reply to these comments. Therefore, other forms of commenting should be used.

Author: Brian Raecke (Brian.Raecke@state.sd.us) Subject: Highlight Date: 01/16/2014 11:02:28 AM
Change Color of Text to Red

Reason - To give notice that when the Text Box or the Callout Tools are used to make comments, the comments shall be placed in areas that do not cover up details in the plans.

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Author: Brian Raecke (Brian.Raecke@state.sd.us) Subject: Highlight Date: 01/16/2014 11:04:04 AM
Change Color of Text to Red

Reason - To notify the Consultants, Project Managers and Designers that the program has this ability and it is a great tool to look at "Rejected" comments.

MANAGING COMMENTS (CONTINUED):

Filter comments

You can hide or show comments based on type, reviewer, status, or checked state. Filtering affects the appearance of comments in both the document window and the Comments list. When you print or summarize comments, you can specify whether hidden comments are printed or summarized. When you hide a note comment that has been replied to, all other replies in the thread are hidden as well.

From the Filter comments menu in the Comments list, do one of the following:

•To clear all filters, choose Show All Comments.

•To hide all comments choose Hide All Comments.

•To filter comments, choose the categories that you want to appear. For example, if you want only sticky note comments that you haven't checked to appear, choose > Type > Sticky Notes so that only the sticky note comments appear, and then choose > Checked > Unchecked so that only unchecked sticky note comments appear.

•To remove a filter, choose All for hidden categories. For example, if you filtered comments so that only those by a certain reviewer appear, choose > Reviewer > All.

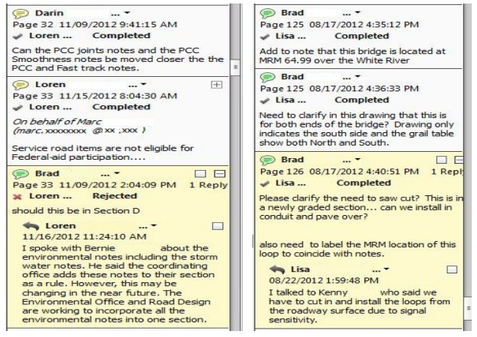
The comments can be filtered using the Status "Rejected". This will filter out all of the comments except the comments with a status of rejected. This makes it much easier to look at the "Rejected" comments and to determine if there is an issue. It also makes it easier to determine if all of the "Rejected" comments have responses.

RESPONSES TO REVIEW COMMENTS AND REVISIONS:

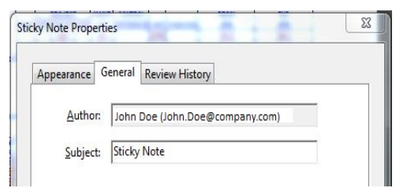
Statuses are useful for keeping track of comments and letting review participants know how you are going to handle the comments. **Each designer or designers that are responsible for responding to the comment shall set the status of their part of the comment.** The review status appears in the comment along with the name of the designer setting the status. If more than one designer sets the review status for the comment, both names and review statuses appear in the comment.

Select the comment in the comments list and right-click to show the options menu. Then choose an option from the Set Status menu. If the designer has complied with the changes requested by the comment the option would be "Completed". The Status "Completed" can be both the Status and the Reply when the comment is totally complied with. If the designer has not complied with the changes requested by the comments the option would be "Rejected". If the comment is rejected then the designer shall explain why it was rejected. With a search of the comments for the word "Rejected" the reviewers can then see the comments not complied with. Once the review status is set, you cannot remove the review status display from the comment in the Comments list, even if you change the review status to "None".

Any Consultant/Designer that rejects a comment shall e-mail the person that made the review comment and the Project Manager with their reason/response to notify the reviewer. The Project Manager shall confirm that all comments have been given a status and if the comment has been rejected a e-mail has been sent to the reviewer.



The e-mail address of each reviewer can be determined by moving the curser over the name of the reviewer or by right-clicking on the comment then Properties>General.



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Author: Brian Raecke (Brian.Raecke@state.sd.us) Subject: Highlight Date: 01/16/2014 11:06:36 AM
Insert Text: "The Status "Completed" can be both the Status and the Reply when the comment is totally complied with."

Reason - No reason to require a reply when the Status indicates how the comment was handled.

Author: Brian Raecke (Brian.Raecke@state.sd.us) Subject: Highlight Date: 01/16/2014 11:06:58 AM
Change Color of Text to Red

Reason - To bring to the attention of the Consultants, Project Managers and Designers that sending the reviewer an email when their comment is rejected is mandated by the Director of Planning & Engineering and the Director of Operations. Sending the reviewer an email with the reasons why their comment is rejected during the review period opens the door for communication. This communication will take place during the review period when there may be time to make design changes.

Author: Brian Raecke (Brian.Raecke@state.sd.us) Subject: Highlight Date: 01/16/2014 11:09:25 AM
Insert Text: "Consultant/"

Reason - To include the Consultants