

Workflow 15 - Electronic Submittal of Project Plan Award Sets Using ProjectWise

This workflow covers the procedure for uploading final Award submittal Plan Sets to a regional Award_Sets folder in ProjectWise. This procedure should be used only for the final complete Award Plan Set (with all Plan and Spec sheets and all revisions) that is ready to be printed. Incomplete Plan Sets cannot be used to activate the construction phase of the project.

The workflow includes procedures for both the Reproduction team and Regional team members that are assigned to complete the electronic plan award process after they have been notified by the Reproduction team :

- compressing and processing .pdf documents in order to make them searchable
- Placing Award Plan Set Files in ProjectWise
- a procedure for setting up filters in gMail so that the automated alerts do not get routed to the recipients' Spam folder.
- Adding the Award stamp to the Award Plan Sets
- Moving Award Plan Sets Within ProjectWise

Repro Workflow Initiation

Letting occurs every Thursday and a Notice of Award is sent via e-mail by the Awards & Contracts group. This notice will initiate the Repro group workflow.

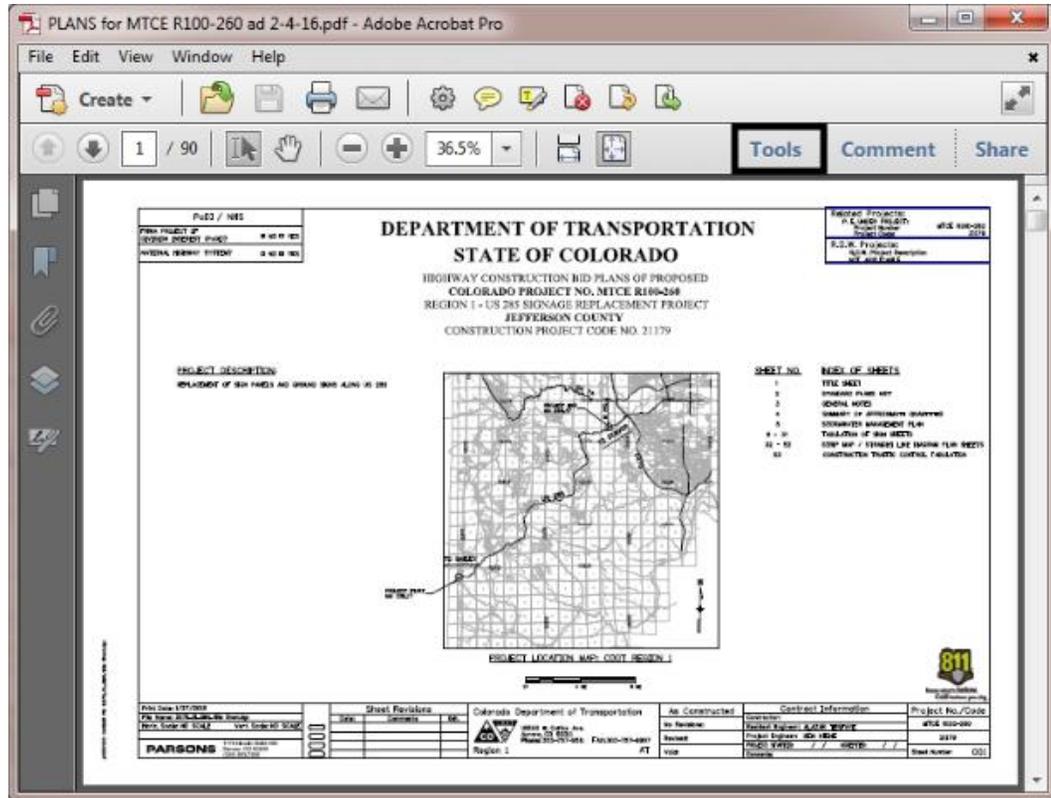
Processing .pdf Documents – Compression, Optimization, OCR

Note: This section is for use by the Reproduction team.

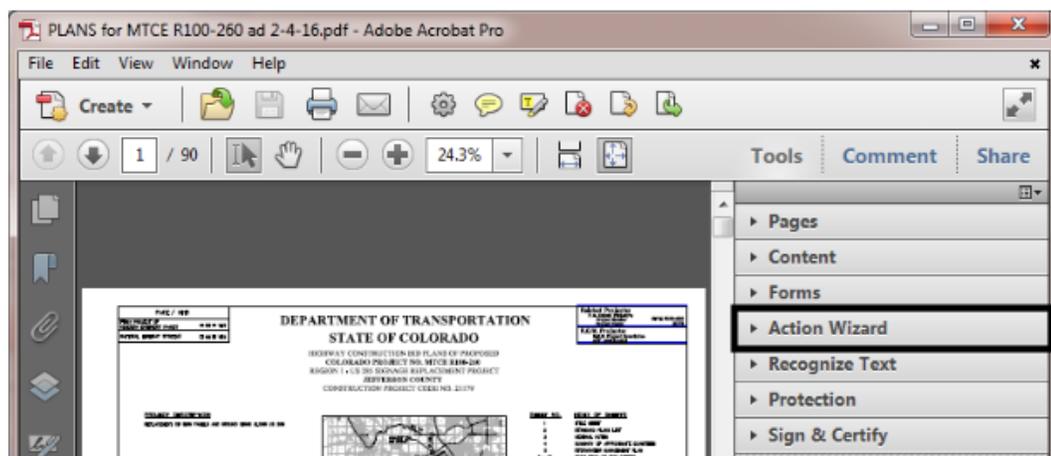
Large PDF documents can be compressed using Adobe Acrobat in order to take up less space. They can also be optimized using Optical Character Recognition (OCR) in order to make the PDF document searchable. The instructions below were developed using Adobe Acrobat XI, so they may not exactly match up with earlier versions (in use by Ad/Repro) or with later versions (such as the Adobe Acrobat DC version currently available via Software Center). The basic principles are the same, but specific buttons or menu options may not be exactly as shown below.

CDOT Workflow Electronic Submittal of Project Plan Award Sets Using ProjectWise

1. Open the PDF (either the Award Plans or Specs) in Adobe Acrobat Pro.
2. From the toolbar, left click on **Tools** (on the right end of the toolbar in Adobe XI Pro) to expand the menu.

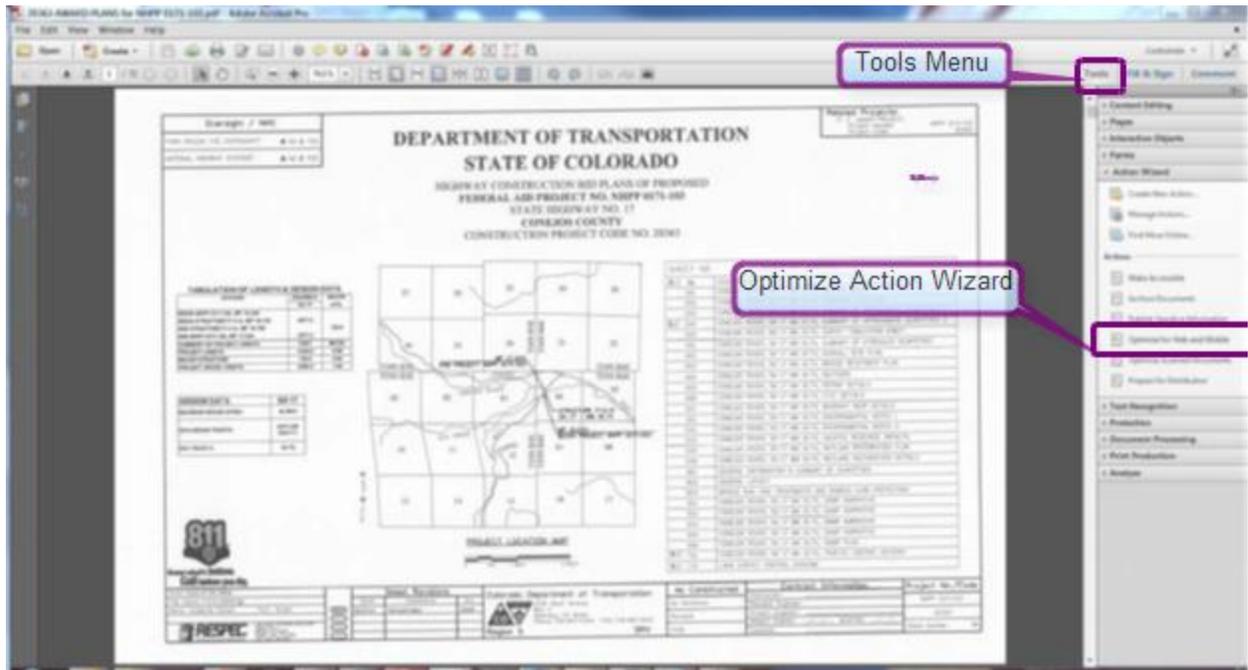


3. In the **Tools** menu on the right. Left click on **Action Wizard** to expand the menu options.

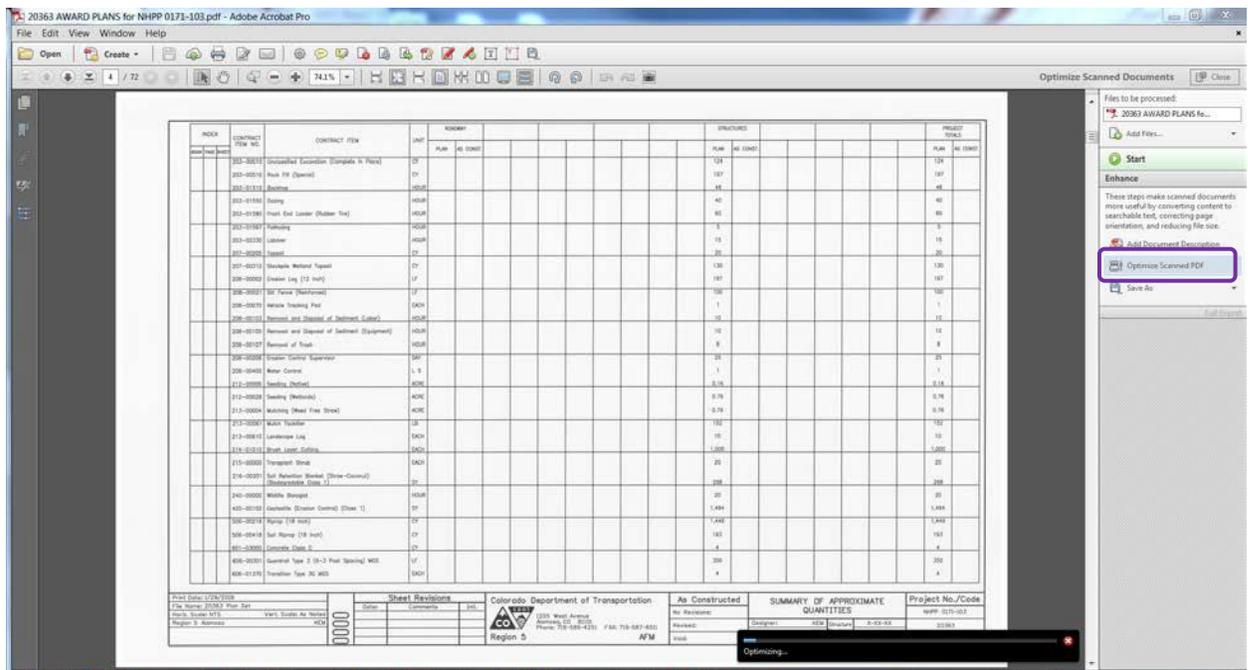


CDOT Workflow Electronic Submittal of Project Plan Award Sets Using ProjectWise

4. In the **Action Wizard** menu area, left click on **Action Wizard** to expand the menu options



5. Select **Optimize Scanned PDF** and wait for it to complete. This can take anywhere from 4-5 minutes up to 15 minutes per file in the case of a large plan set with many pages in both the plans and specs.



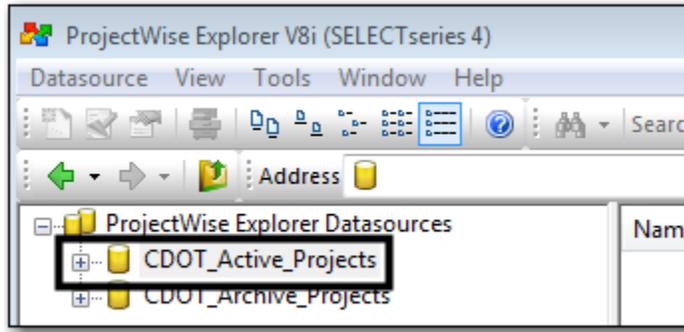
6. Once the optimization is complete select **File > Save** from the menu bar before uploading it to ProjectWise.

Once the file has been saved, the file size is reduced by as much as 90% in many cases, page orientation is corrected (referred to as de-skewing), and the resulting file is rendered capable of being searched (referred to as OCR –Optical Character Recognition). Being able to search a plan set or specs is a very powerful tool and saves tremendous time over having to page through the documents looking for something.

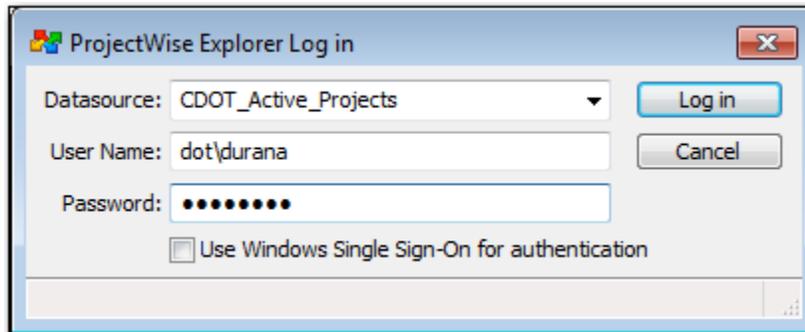
Placing Award Plan Set Files in ProjectWise

Note: This section is for use by the Reproduction team.

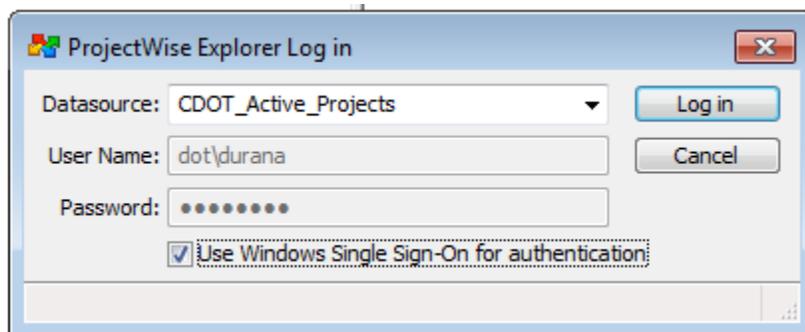
1. Open ProjectWise Explorer.
2. Login by double-clicking on the **CDOT_Active_Projects** datasource as shown below:



3. If the **ProjectWise Explorer Log in** window is displayed, fill in your **User Name** (with the **dot** prefix) and **Password**:

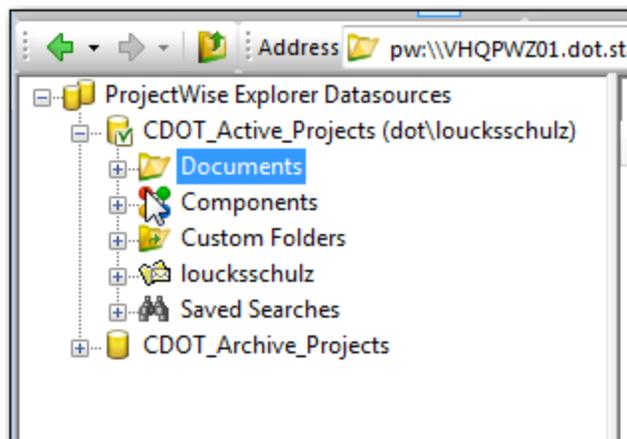


Hint – when the **User Windows Single Sign-On** box is toggled on, as shown below, ProjectWise is automatically logged in by double clicking on the desired datasource.



Note: ProjectWise will remember the folder you were last using and navigate to it automatically.

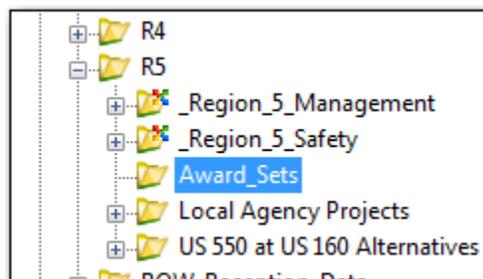
4. Expand the **Documents** folder (if it's not expanded already) by clicking on the + sign, or double-clicking on the folder itself.



5. Navigate to the appropriate regional folder (R1-R5) and expand it.



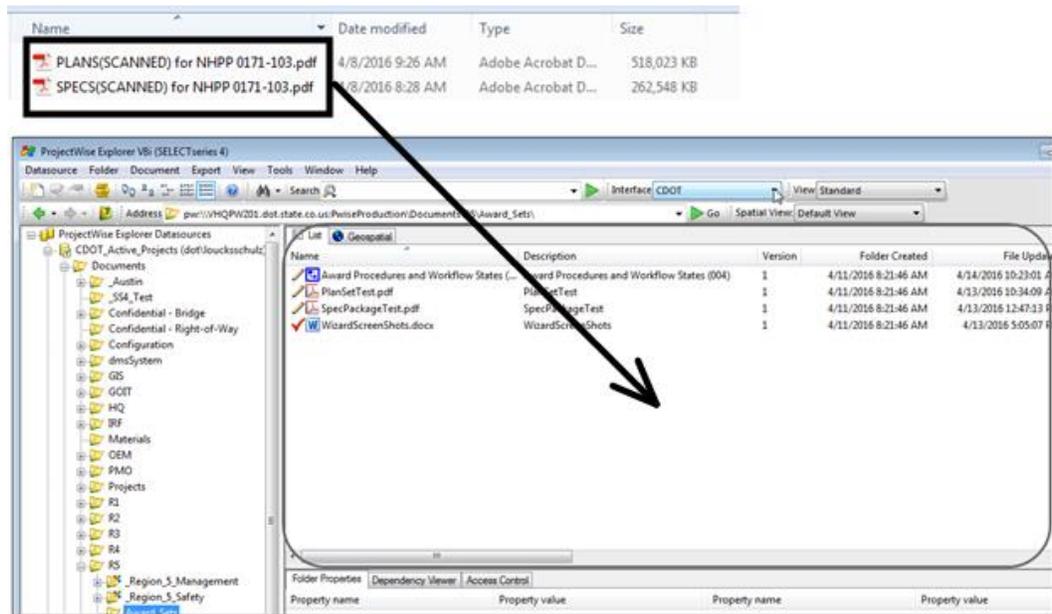
6. Select the **Award_Sets** folder.



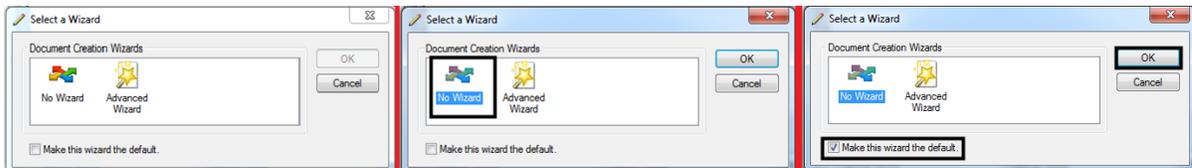
Note: This procedure should be used only when an Award Plan Set is complete, with all Plan and Spec sheets and all revisions, and is ready to be printed.

7. Find the completed Award Set document(s) to be placed in the **Award_Sets** folder, select the file(s), and drag it into the folder contents window in ProjectWise Explorer.

Hint –multiple documents can be selected and dragged all at once, but do not drag folders into ProjectWise. Only ProjectWise administrators can delete folders in ProjectWise.

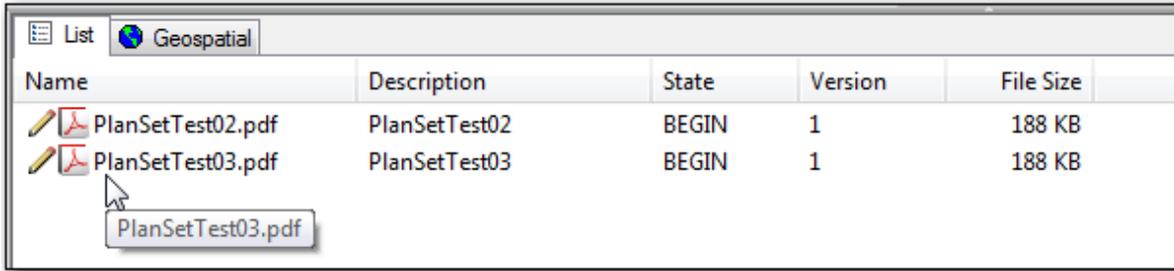


8. If the **Select a Wizard** dialog box pops up, highlight **No Wizard**, toggle on the **Make this wizard the default** check box, then click **OK**. This will keep the **Select a Wizard** dialog box from being displayed in the future.



Note: Once the award plan set has been placed in the Award_Sets folder, the **Workflow And States** starts by automatically assigning the **Begin** state to the file.

The **Award_Sets** folder has a custom view assigned to it that displays the file **Name**, **Description**, the current **State**, Version, and the **File Size**.

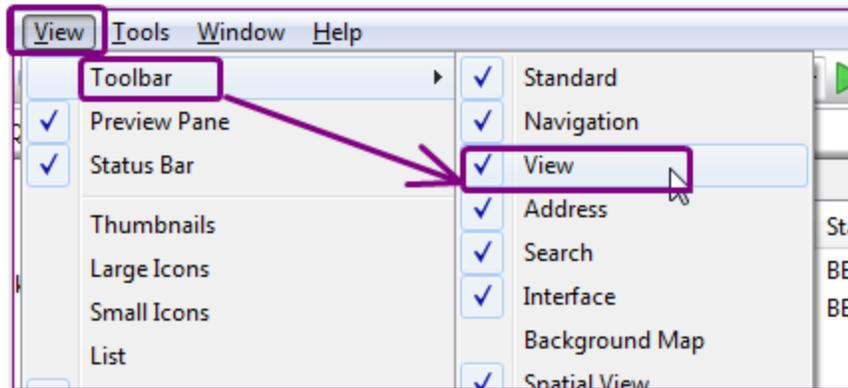


| Name | Description | State | Version | File Size |
|-------------------|---------------|-------|---------|-----------|
| PlanSetTest02.pdf | PlanSetTest02 | BEGIN | 1 | 188 KB |
| PlanSetTest03.pdf | PlanSetTest03 | BEGIN | 1 | 188 KB |

9. If the view window does not display the columns shown above, check the **View** selection toolbar and set it to **Award_Sets**.

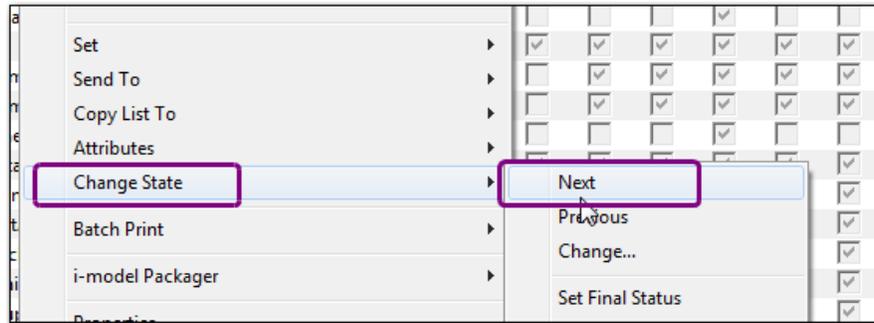


10. If the **View** selection toolbar is not shown, select **View > Toolbar** and then toggle on **View**. The **View** selection toolbar will appear in the toolbar area at the top of the ProjectWise Explorer.



Once the file(s) have been placed in the **Award_Sets** folder, the next step is to change the document **State**.

11. Highlight the file in the folder contents window, right-click on it, left click the **Change State** option in the pop-up menu, then left click **Next**. This changes the state from Begin to Award Complete.



The illustration below shows the results of the Change State on the PlanSet Test02.pdf file. The state of the document has been changed from BEGIN to Award Complete Rx (R5 in this example).

| Name | Description | State | Version | File Size |
|-------------------|---------------|-------------------|---------|-----------|
| PlanSetTest02.pdf | PlanSetTest02 | Award Complete R5 | 1 | 188 KB |
| PlanSetTest03.pdf | PlanSetTest03 | BEGIN | 1 | 188 KB |

An e-mail is automatically sent to the Finals Engineer and a designated backup, letting them know that the electronic Award set is available so that they can start their workflow. This includes reviewing the electronic Award set, applying the Award Stamp watermark, and moving the file(s) to the appropriate ProjectWise Project folder.

The notification e-mail includes a live link to the files' location. So, by simply clicking on the link, ProjectWise will open (if it's not already open) and navigate directly to the specific file listed in the e-mail. An example of the email link is shown below.

'Project Award Plan Set REV#1 SPECS.pdf uploaded by
Reproduction' Inbox x

ProjectWise.GroupMaintenance@sta Apr 28 (6 days ago) ☆
to Edward.Archule., David.Valentin., Casey.Valentin., Thomas.E ▾
['REV#1 SPECS.pdf'](#) changed to workflow state 'Award Complete R5' by durana on 4/28/2016 9:56:51 AM. The Award Set file is ready to be placed in the ProjectWise Project Folder under Plans_and_Specs\4-Award.

Setting up Gmail Filters

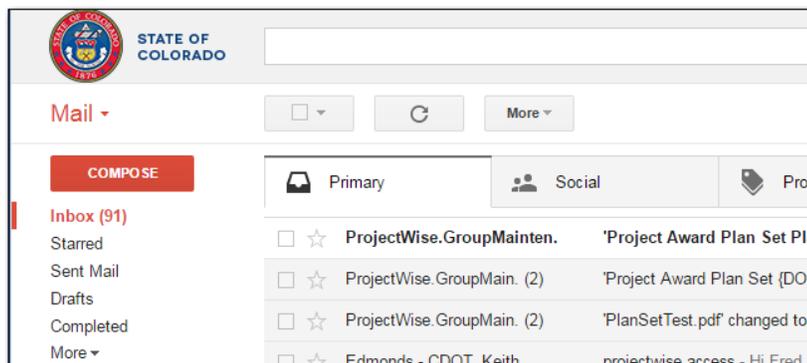
Important! – If the following steps are not completed, the automated Workflow and States notifications may go directly to the Junk Mail (SPAM) folder.

Sending messages via an automated system can result in messages being flagged as suspicious, junk mail, or spam. The following instructions are used to set up a filter in Gmail that will send these messages directly to the Inbox instead of the Spam folder.

This procedure assumes that an automated message has been received from ProjectWise.GroupMaintenance that has landed in the Junk Mail folder.

Use a particular message to create a filter

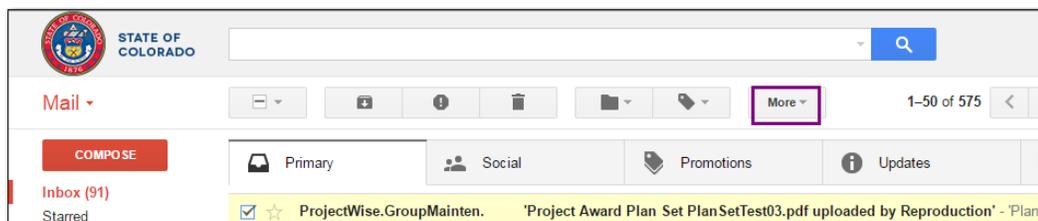
1. Open Gmail.



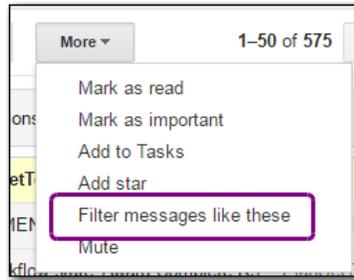
2. Open the Spam folder
3. Toggle on the checkbox next to the email you want to deliver to your Inbox rather than your Spam folder.



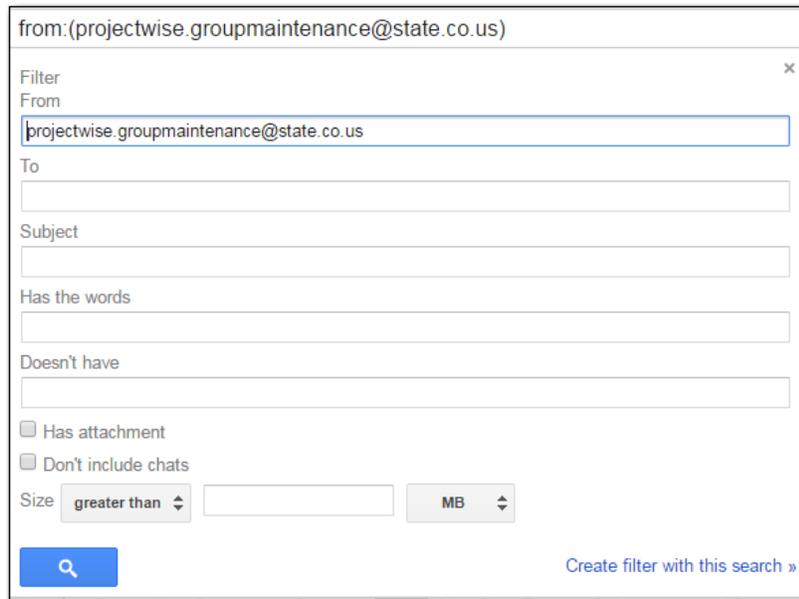
4. Click **More**.



5. Click **Filter messages like these**.



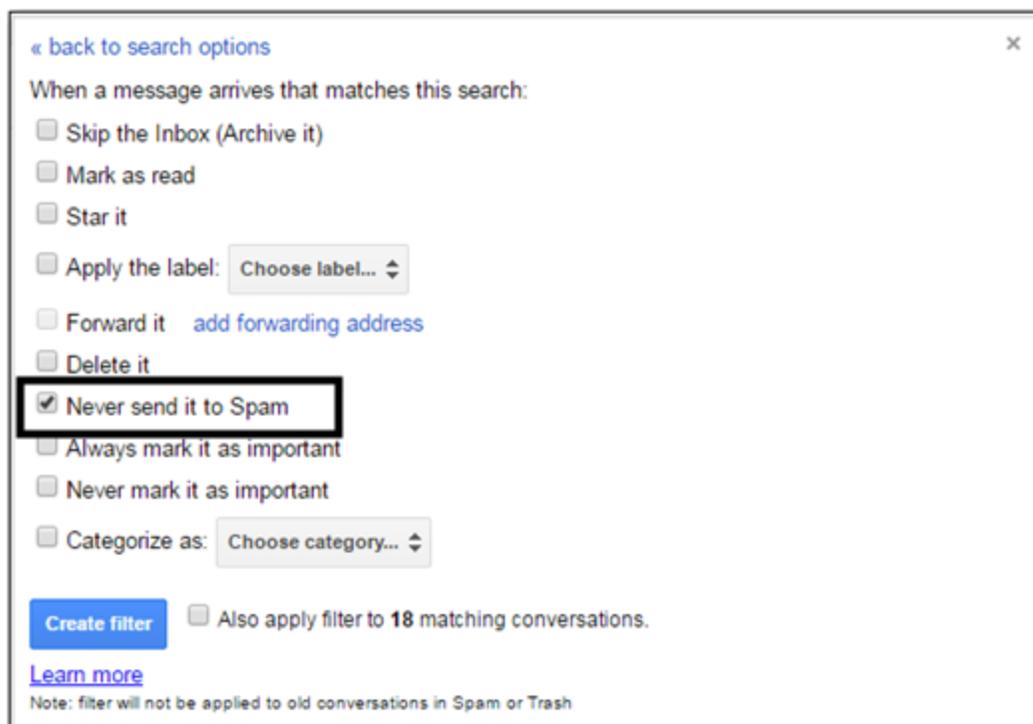
6. Enter your filter criteria. The default is the e-mail address, which is filled in automatically.



7. Click **Create filter with this search >>**



8. Select **Never send it to Spam**.



9. Click **Create filter**.



Future e-mail from this sender will be delivered to your Gmail inbox instead of to the Spam folder.

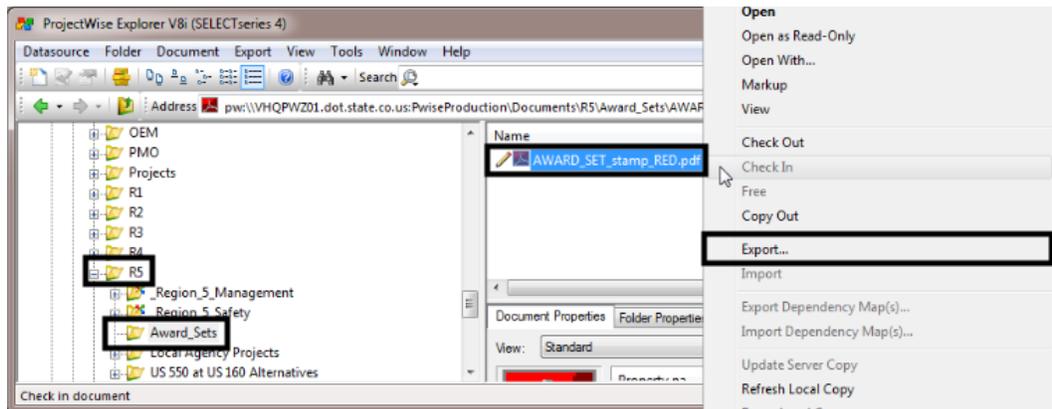
Adding an Award Stamp Watermark to PDF Files

This section guides describes the process of adding a watermark to a PDF plan set. This method uses Adobe Acrobat Professional to add a watermark to an existing set of plans in PDF format.

Before the Award stamp can be added to a plan set, the stamp image must be exported from ProjectWise to a location on the user's computer.

Exporting The AWARD_SET_stamp_RED.pdf

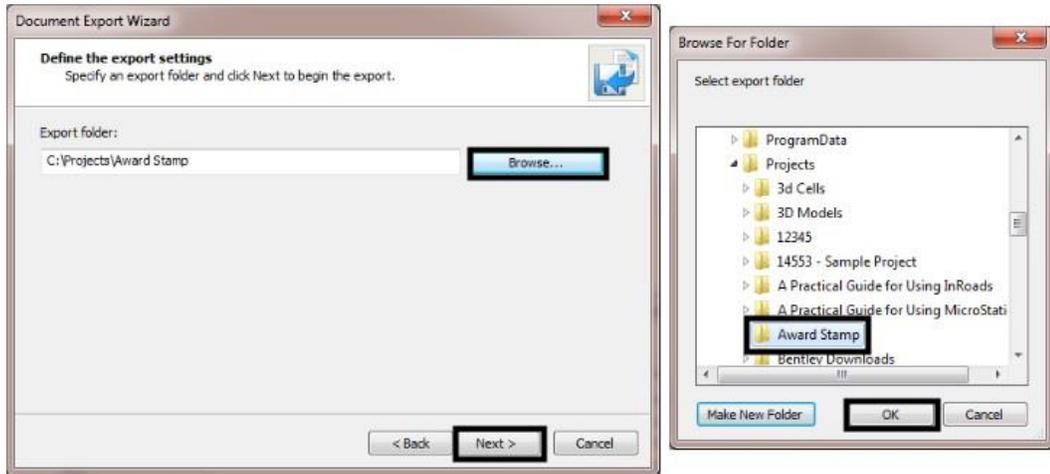
1. In ProjectWise Active Projects, navigate to **R5 > Award_Sets**. This is the location of the **AWARD_SET_stamp_RED.pdf**.
2. Right click on the **AWARD_SET_stamp_RED.pdf** file and select **Export** from the flyout menu. This displays the **Document Export Wizard** dialog box.



3. In the **Document Export Wizard** dialog box, toggle on **Send to Folder – Creates unmanaged local copy**.
4. Left click the **Next** button.



- Next, set the **Export Folder** to the desired location. In this example **C:\Projects\Award Stamp** is used.
- Left click the **Next** button



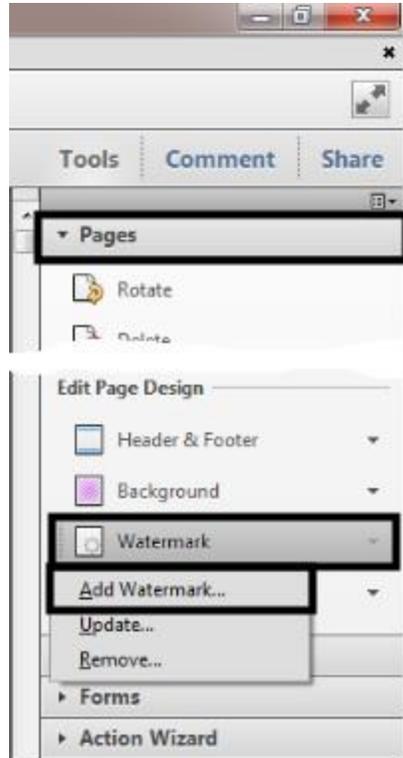
- The final dialog box, left click **Finish**. This copies the **AWARD_SET_stamp_RED.pdf** to the local location.

Applying the AWARD Stamp as a Watermark

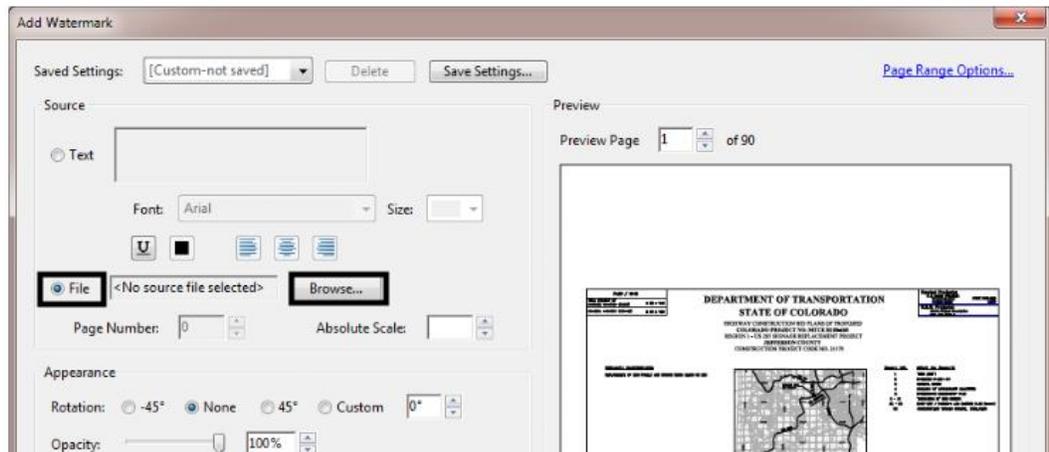
- Open the desired plan set in Adobe Acrobat Professional.
- From the main tool bar, left click on **Tools** to expand the menu.



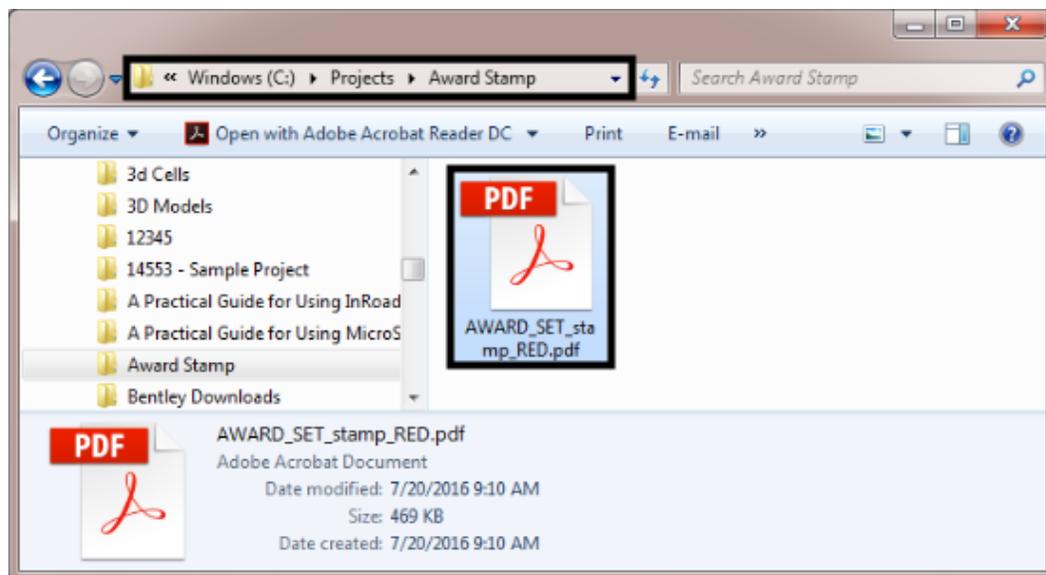
3. Left click on the **Pages** toolset. This displays the page editing commands, including **Watermark**.
4. Left click on **Watermark** and select **Add Watermark** from the dropdown menu.



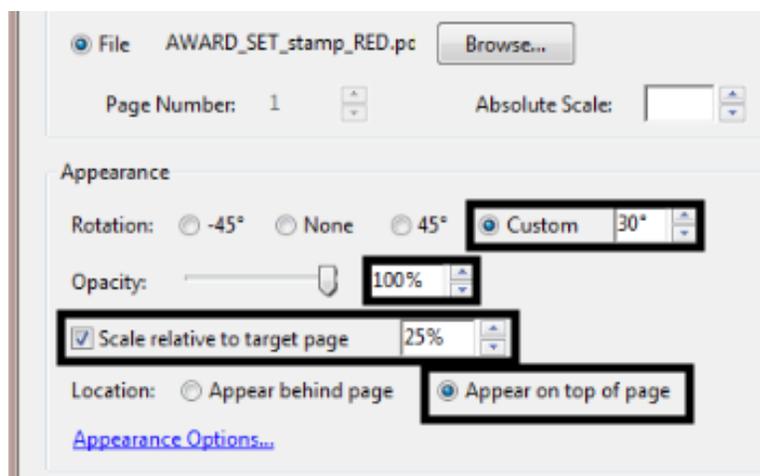
5. In the **Source** area of the **Add Watermark** dialog box, toggle on **File**.
6. Left click the **Browse** button to display the **Open** dialog box.



7. In the **Open** dialog box, navigate to the location of the AWARD Stamp.jpg file.
8. Highlight the **AWARD_SET_stamp_RED.pdf** file then left click **Open**. This accepts the selection and dismisses the **Open** dialog box.

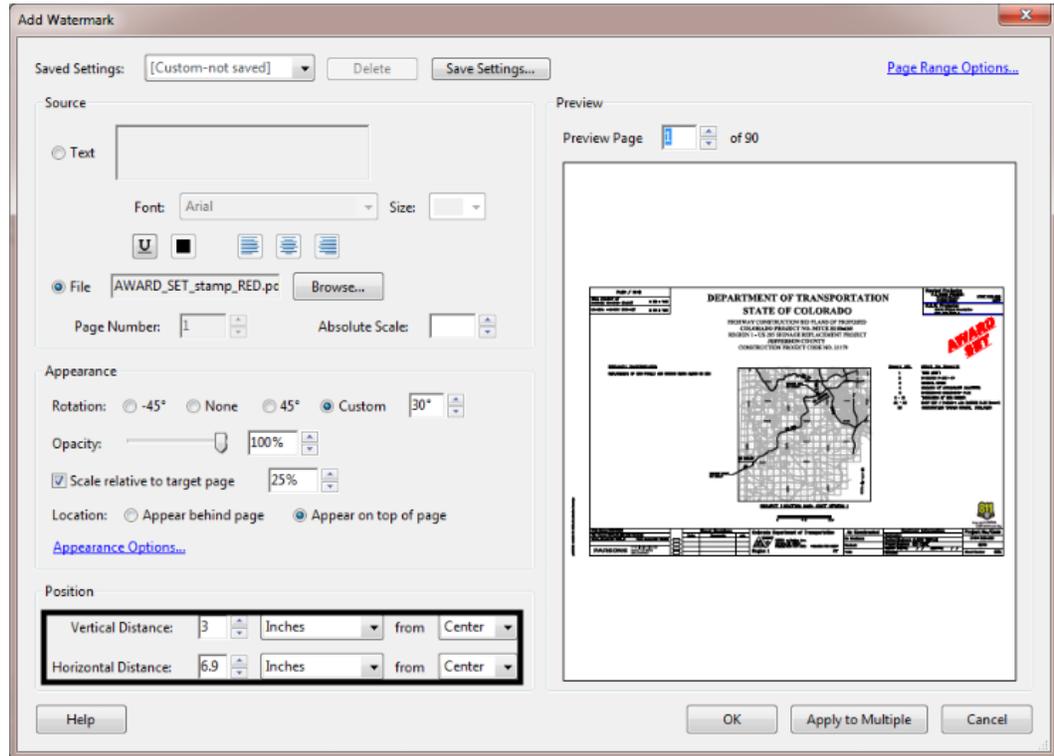


9. In the **Appearance** area, set the desired **Rotation**. The stamp image should be rotated so that it stands out. In this example, the **Rotation** was set to **Custom** and **30** degrees.
10. Set the desired **Opacity**; typically, **100%** is used.
11. Toggle on **Scale relative to target page** and set the value to **25%**.
12. Toggle on **Appear on top of page** for **Location**.



The Award stamp should be placed in a white area on the page. In this example, it was determined that the lower left corner would be used for the Award Stamp.

13. In the **Position** area, both the **Vertical Distance** and **Horizontal Distance** are set to **Inches**.
14. The **Vertical Distance from** option is set to **Center**.
15. The **Horizontal Distance from** option is set to **Center**.
16. The following values are used; **Vertical Distance = 3** and the **Horizontal Distance = 6.9**.

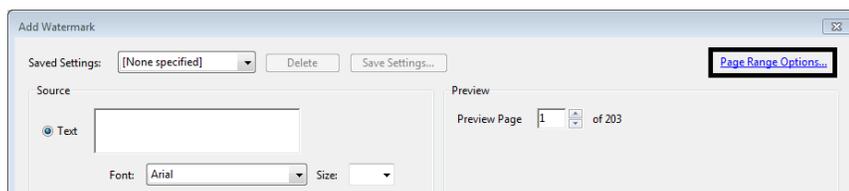


| Position Offsets For Various Award Sets | | | |
|-----------------------------------------|-------------------|---------------------|---------------|
| Award Set Type | Vertical Distance | Horizontal Distance | From Position |
| Plans | 3 | 6.9 | Center |
| Plans (Alternate) | 4 | 4 | Center |
| Special Revisions | 2.75 | 3 | Center |
| Specifications | 3.75 | 3 | Center |

Note: All other settings remain the same for each Award Set type.

Because the placement of the Index Of Sheets on the Plan set is not fixed, the above Horizontal and Vertical distances may have to be adjusted in order for the stamp to fall completely into white space. Observe the Preview in order to determine when the Award stamp has been positioned properly.

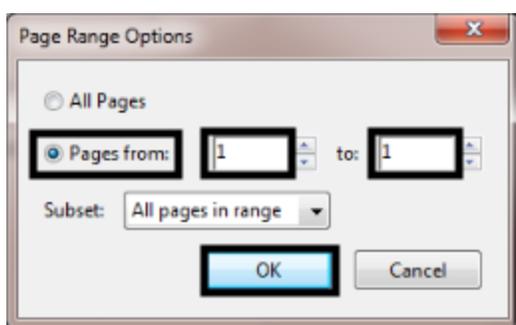
17. Left click the **Page Range Options** link (in the upper right corner).



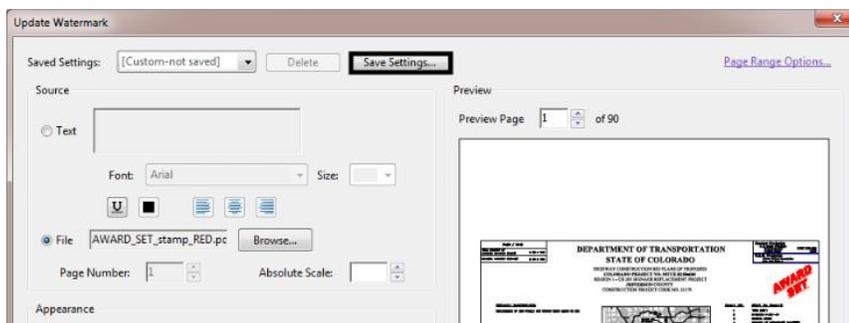
18. In the **Page Range Options** dialog box, toggle on **Pages From**.

19. Key in or select **1** in the **From** and **To** fields. This applies the Award stamp to the title sheet only.

20. Left click **OK**. This sets the watermark for the title page and dismisses the **Page Range Options** dialog box.

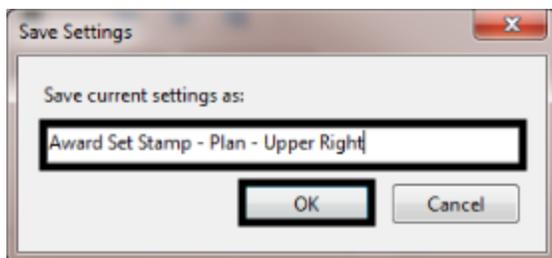


21. Left click the **Save Settings** button.

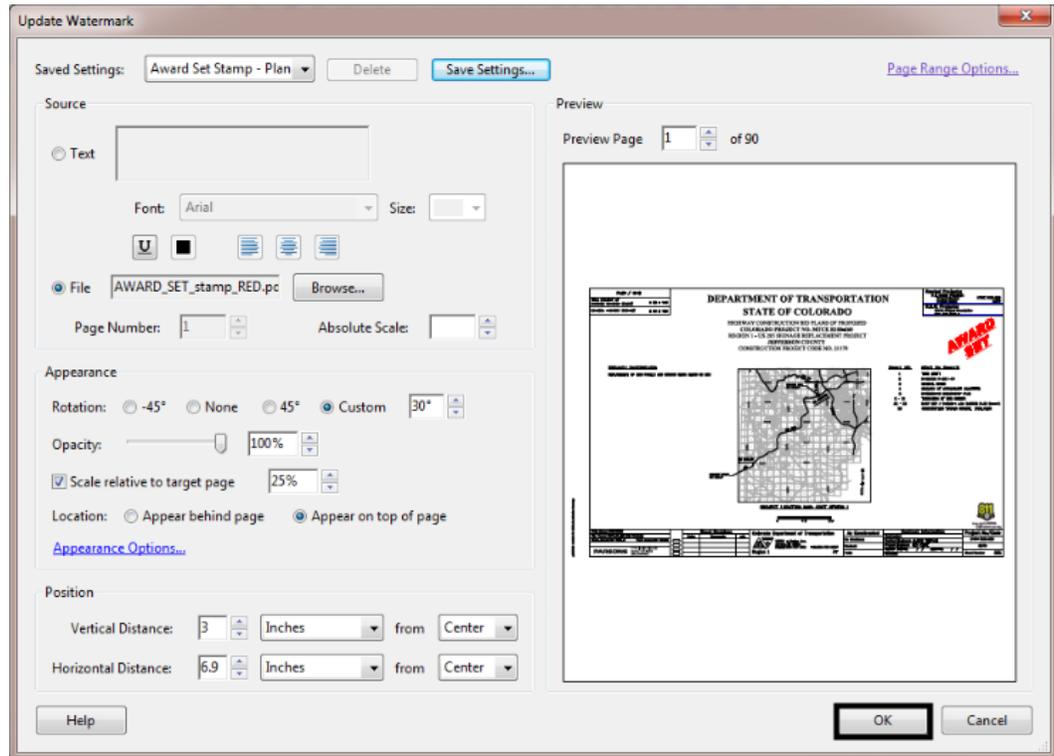


22. In the **Save Settings** dialog box, key in the desired setting name. The setting name should identify what the watermark is for. In the illustration below, the name indicates that the Award stamp is placed in the lower left corner of the page.

23. Left click **OK** to save the settings.



24. In the **Add Watermark** dialog box, left click **OK**. This applies the specified watermark to the indicated pages.

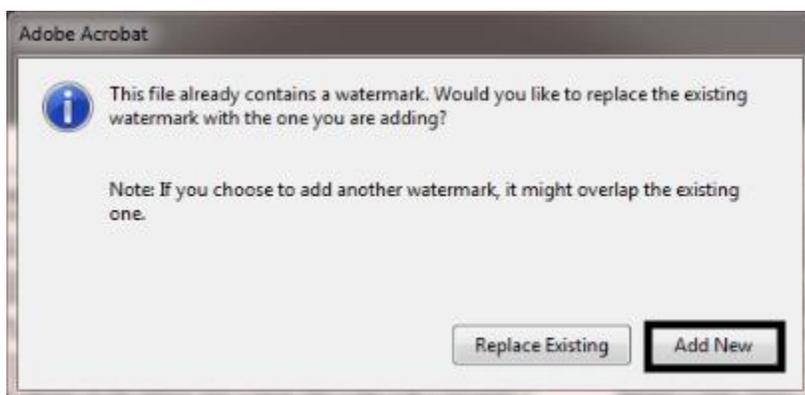


25. To change the watermark settings, reopen the **Add Watermark** dialog box and make the desired changes.

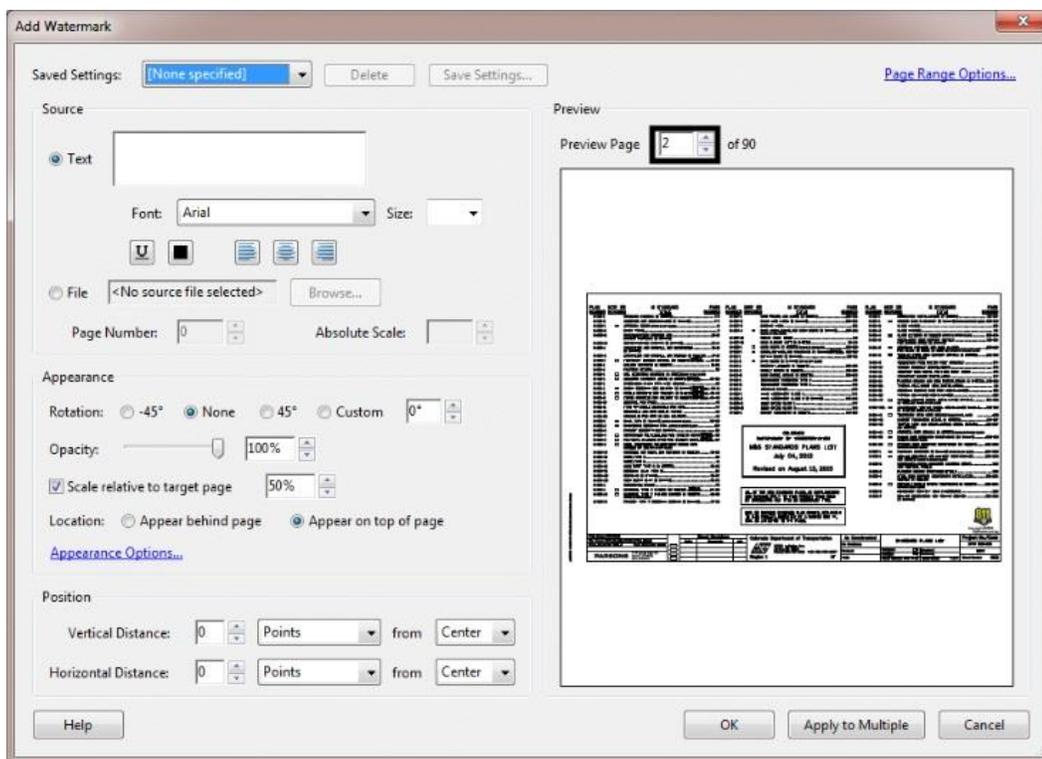
Using Multiple Award Stamp Watermarks in a Plan Set

If the Award stamp watermark is to be applied to multiple pages, it may be necessary to create multiple watermarks so that it can be placed in the available white space on the desired pages.

1. Left click on **Watermark** and select **Add Watermark** from the dropdown menu.
2. When the **Add Watermark** option is selected, the following dialog box is displayed. Left click the **Add New** button.

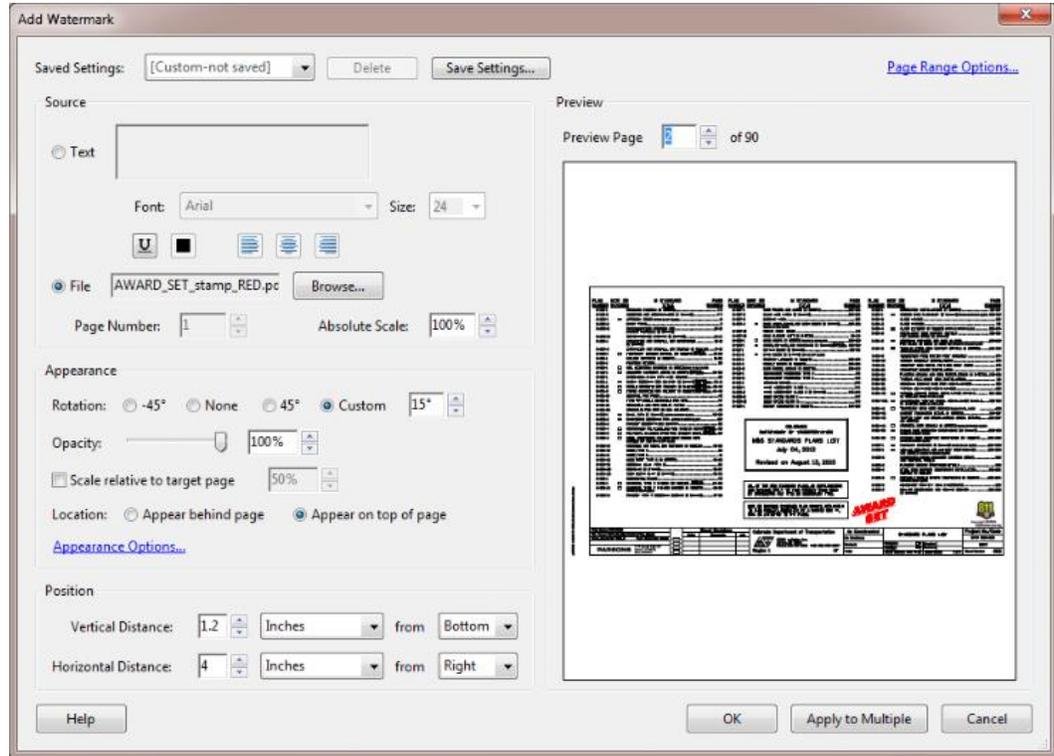


3. In the **Add Watermark** dialog box, advance the **Preview** to the page receiving the new watermark.



- Using the same process outlined in the section above, create the other watermarks needed.

The illustration below shows the settings for an additional Award stamp watermark for the example file.



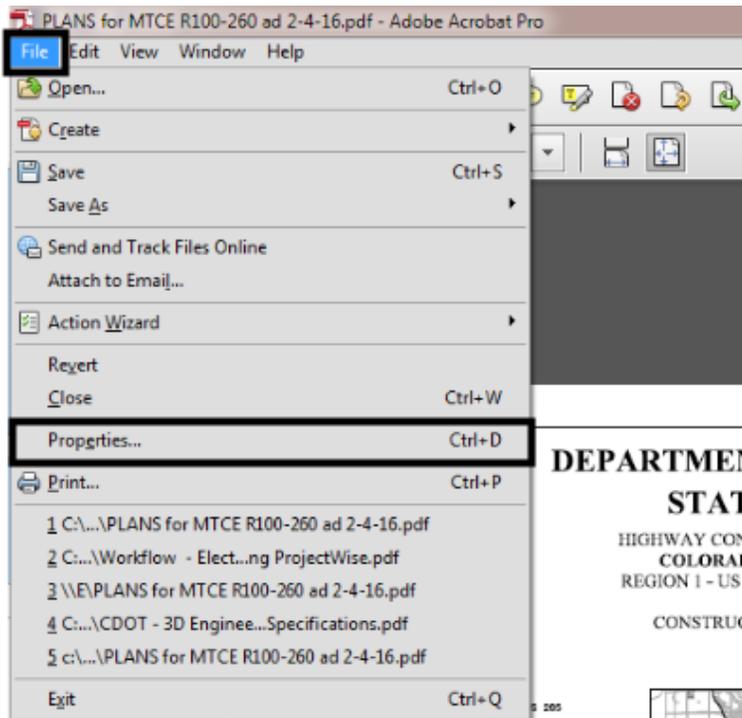
Any number of watermarks can be added in this manner. After they have been created in a document, the Award stamp watermarks are available for use in other files. Therefore, it is important that the **Save Settings** names used reflect the type and position of the watermark.

Adding Security to the Award Plan Set

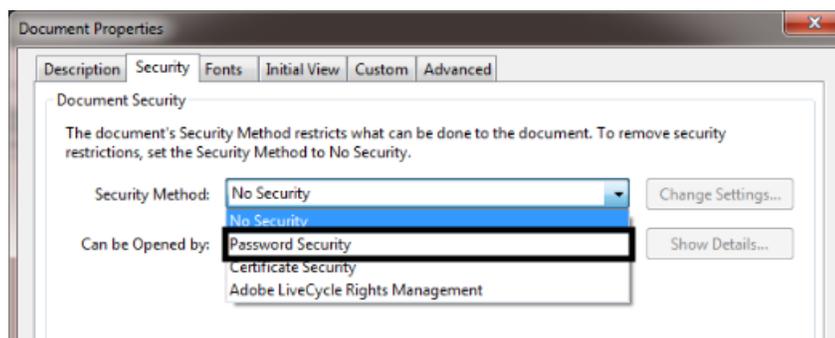
The next step after applying the Award Stamp to the Plan Set is to set document security. This step is necessary to ensure that each document's integrity is maintained.

To add security to the file:

1. With the file open in Adobe Acrobat Professional, select **File > Properties** from the menu bar. This displays the **Document Properties** dialog box.

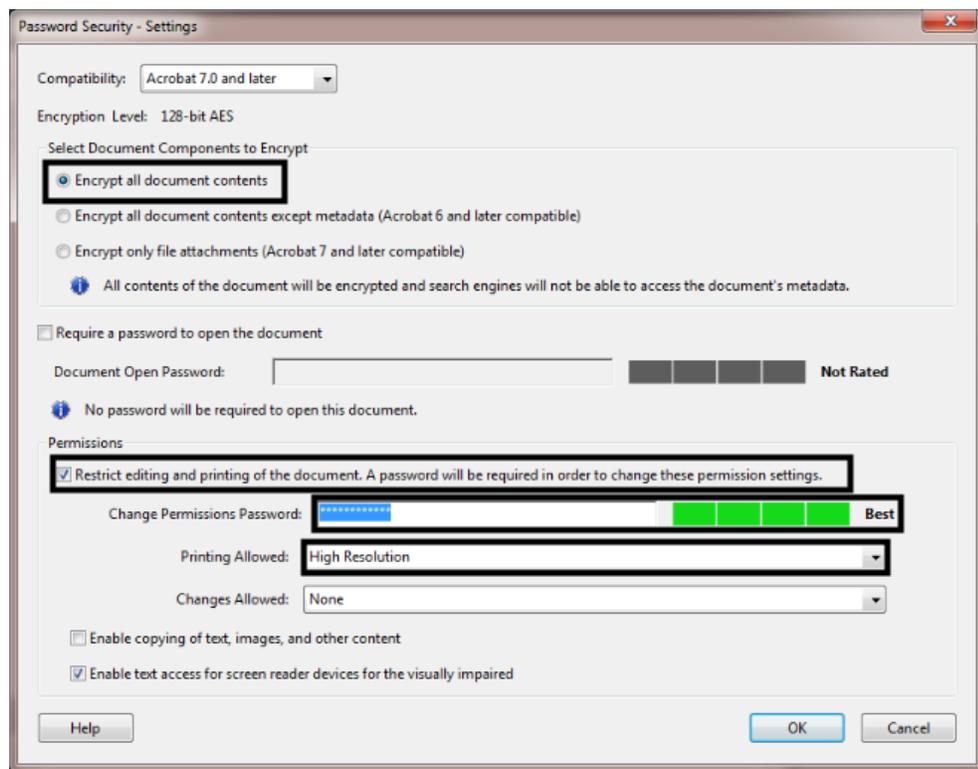


2. In the **Document Properties** dialog box, left click on the **Security** tab. This displays the **Security** leaf.
3. On the **Security** leaf, use the drop down menu to change the **Security Method** to **Password Security**. This displays the **Password Security – Settings** dialog box.



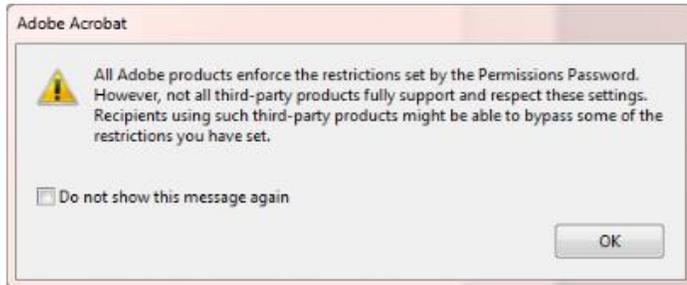
Note: If the **Password Security – Settings** dialog box does not appear, left click the **Change Settings** button.

4. In the **Password Security – Settings** dialog box, Make the following settings:
 - Toggle on **Encrypt all document contents**.
 - Toggle on **Restrict editing and printing of the document**.
 - In the Change Permissions Password field, key in the desired password. This password should be unique to the document and meet the “**Best**” criteria. (it should contain upper and lower case letters, numbers, and special characters or symbols)
 - Set **Printing Allowed** to **High Resolution**.

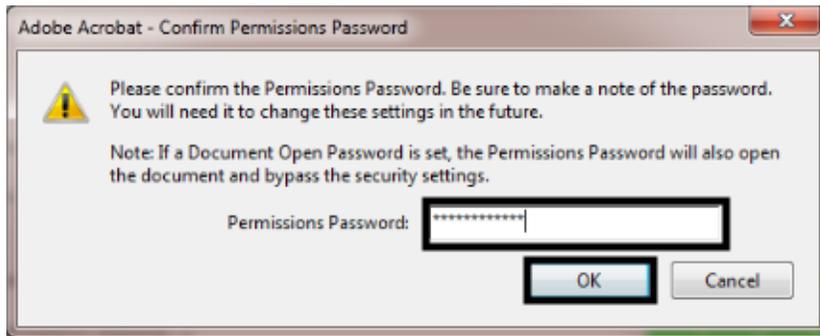


Note: The **Password Security – Settings** dialog box may be laid out differently than the illustration shown above, however, the same options will be available.

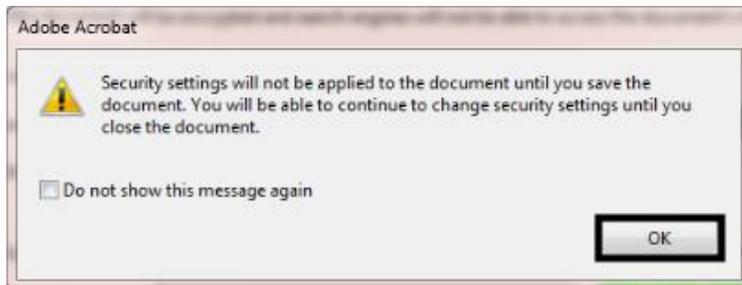
5. Left click the **OK** button to accept the changes and dismiss the **Password Security – Settings** dialog box. A message box may be displayed stating that third party software may not support the protection applied to the file. Left click the **OK** button to dismiss the message window.



6. A password verification dialog box is displayed. Enter the document's password in the **Permissions Password** field then left click **OK**.



7. A message window stating that the security will not take effect until the file is saved is displayed. Left click **OK**.



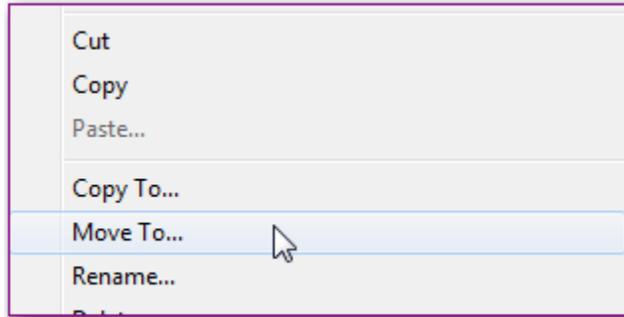
8. . Left click **OK** in the **Document Properties** dialog box.
9. Select **File > Save** from the menu bar to save the file and enact the permissions.

Note: It is not necessary to remember the password on this file once it is set because the file should never be altered. If changes are required, it will be replaced with a new file.

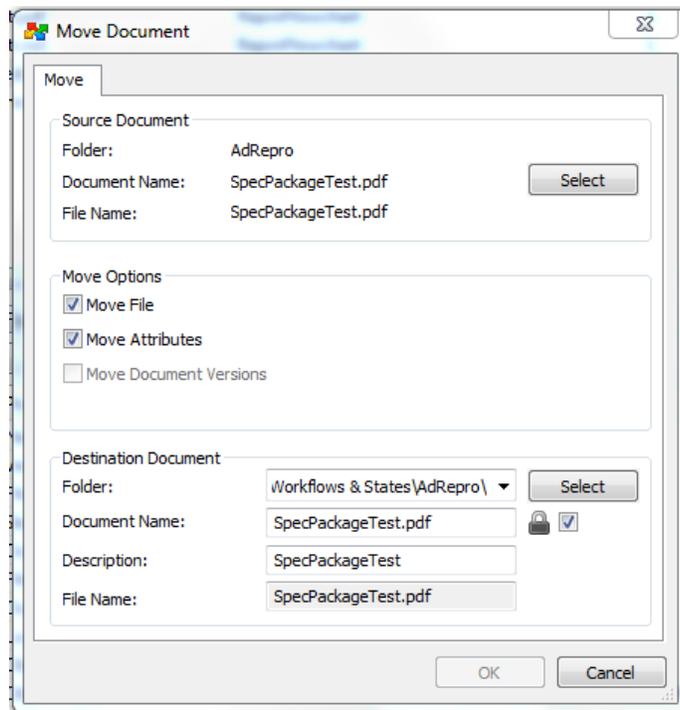
Moving Award Plan Sets within ProjectWise

Once the Award stamp has been applied to the plan sets, they can be moved to the appropriate ProjectWise project folder.

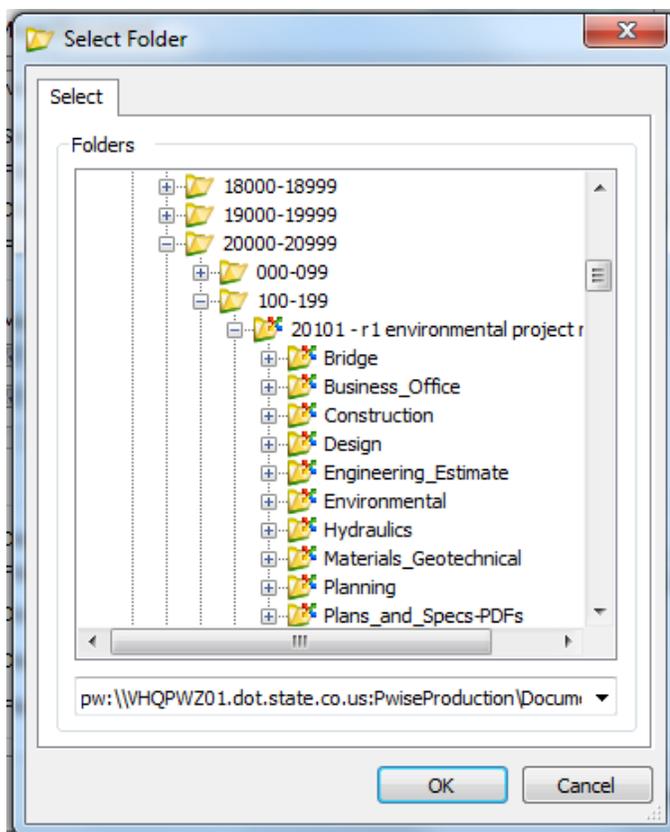
1. Select the Award plan file to be moved.
2. Right-click on the file and select **Move To...**



3. Under the **Destination Document** section, left click **Select**.



4. Navigate to the desired project folder and sub-folder.



5. Left click **OK**.

The file will be copied to the new location and the original will be deleted from the Award_Set folder.

Note: The **Move To** command only allows for one file to be moved at a time. This process must be repeated for each file in the plan set.

Notification of Award Set Plan Availability

Once the Award Plan Set for the project is moved to its final location in the project folder, an email should be sent to the Resident Engineer and the Project Team notifying them of the Award Plan Set availability in ProjectWise.