

NDDOT Guidance on Adobe Shared Review

Contents

Overview	2
Reasons for using Adobe Shared Review	2
Identifying Yourself When You Participate in a Shared Review	2
Lead Designers (Person Setting up the Adobe Shared Review).....	3
Document Preparation	3
PS&E reviews.....	3
Documented Categorical Exclusions	3
Adobe Shared Review Setup Procedure	4
Templates for Microsoft Outlook Invitation and Emails.....	8
PS&E	8
Documented Categorical Exclusion (DCE).....	8
Special Instructions for Consultant Projects	9
Workflow for Consultants	9
Adobe Shared Review folder Structure and Purging	10
Deleting Adobe Shared Review Server Profiles	11
Importing comments submitted as an “fdf” file	11
Addressing PS&E comments	12
Reviewers	13
How do I comment through Adobe Shared Reviews?	13
How do I participate in a “Shared Review” if I don’t have access to the NDDOT Network?	14
Tracker	15

Overview

Adobe Shared Review is a pdf tool used to collaborate on documents. This guide discusses using the Adobe Shared Review tool for the DCE and PS&E reviews. These instructions can be adapted for other types of reviews.

People initiating an Adobe Shared Review need Adobe Acrobat. People participating in a review can use either Adobe Acrobat or Adobe Reader.

Reasons for using Adobe Shared Review

1. Comments and responses are structurally organized based on the original pdf document (example, comments about page 10 are seen on page 10). Everyone's comments about page 10 can be reviewed in one location.
2. Comments can be reviewed by all reviewers as soon as they are submitted. This can simplify a review. If a reviewer has made a comment and it is the same as one you might make, you may not have to comment on the issue or you may not need to reiterate the concern with as much detail.
3. This workflow helps document the PS&E meeting, comments and responses.

Identifying Yourself When You Participate in a Shared Review

The first time you participate in an adobe shared review process you may be prompted to identify yourself. These steps are not included in these instructions. Prompts (additional dialog boxes) will occur when you try to create or review a shared document. The additional dialogs are general prompts like what is your name and email. These settings are stored in the active windows profile. Make sure all fields are filled out. Using all the identity fields will help others identify your comments. After you reply to the prompts you won't be asked again. If you need to edit your identity settings, access "Menu > Preferences > Identity".

Lead Designers (Person Setting up the Adobe Shared Review)

Document Preparation

PS&E reviews

The Engineers Estimate and Supplemental headers need to be included.

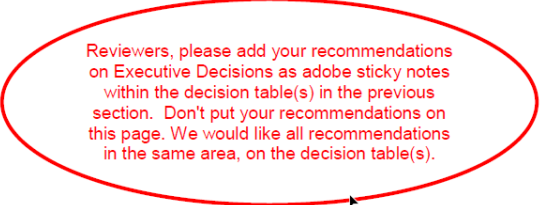
1. PS&E reviews include a review of the Engineers Estimate. In order to avoid multiple shared reviews for one PS&E, the engineers estimate should be prepended to the plan set used for the PS&E review. The Engineers Estimate is placed before the title sheet because it will make it more apparent that the Engineers Estimate is included.
2. Use Adobe to add an additional header to the pdf before posting. The header should note the plans are for **PS&E review, scheduled review date and time**, and a **page number**. Adobe uses the actual page number when referencing comments. The comment references will not list the NDDOT section – sheet number labeling system. Adding a header with actual page numbers will simplify comment referencing later in the adobe shared review workflow. See this linked video for an overview on using an adobe header: S:\SUPPORT\How_To\AdobeSharedReview\Adobe-Headers-and-Footers.mp4

Documented Categorical Exclusions

The pdf version of the Draft DCE should be stamped on the “Executive Decisions” page(s) with an adobe stamp before it is prepared for an Adobe shared review.

1. The stamp is named “Draft DCE – Executive Decisions Page”. This stamp will need to be copied to your computer before you can use it.
Copy the file
S:\STANDARD\Adobe\Stamps\Draft DCE-Executive Decisions Page.pdf
and paste it in the following folder
C:\Users\{User Name}\AppData\Roaming\Adobe\Acrobat\DC\Stamps.
Use your {User Name} folder in this path.
2. Once the stamp is copied to your computer, it can be accessed within the Adobe toolbox from “Draw>Stamp Pallet”. From the Stamps dialog box, select NDDOT from the dropdown field. Adobe stamps are a type of adobe comment. The stamps will need to be published when the shared review document is created.

Add the stamp to the “Executive Decisions Page”. If the Executive Decisions spans multiple pages, include a stamp on each decisions page. The samp looks like this.



Reviewers, please add your recommendations on Executive Decisions as adobe sticky notes within the decision table(s) in the previous section. Don't put your recommendations on this page. We would like all recommendations in the same area, on the decision table(s).

Adobe Shared Review Setup Procedure

1. Create a folder on the N: drive. Folder security and permissions can cause complications. The “R” drive will not work for a shared review. Adobe Share Reviews are posted on the N: drive because this drive is not secured.

Use this folder structure for PSE reviews

N:\~AdobeSharedReview\PSE_Review_Bid_Ready_Month\Year-Month\PCN)

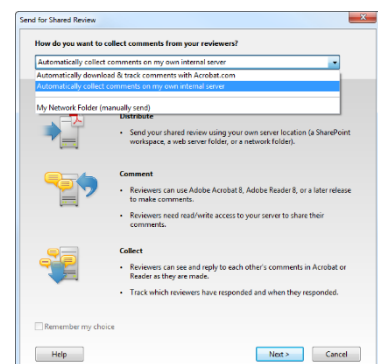
Use this folder structure for all other reviews

N:\~AdobeSharedReview\Temp_by_Deadline\Year-Month\Subfolder Named by User)

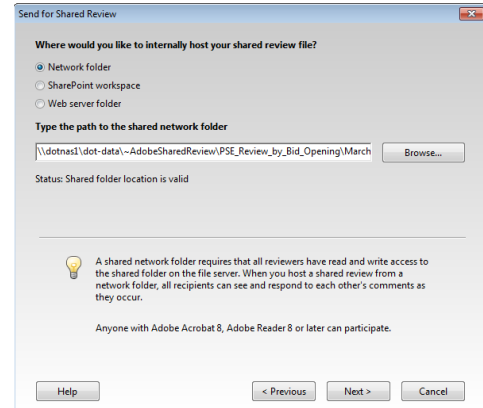
Please note that this folder structure is not protected. Many users have full access to this directory and will be writing to this folder structure. Be careful, don’t delete or write over other users work.

This note may seem counterintuitive, but DON’T manually save your original PDF in this folder. A pdf setup for shared review will be different than the original document. Shared review documents properties are specifically set up for the shared review process. The shared review posting process will create another version of your document and the name of your document will be appended with the text “_review”. The shared version will be created by following these instructions and using the shared review tools. The original document will not be altered. Posting the original document and the shared review document in the same location will confuse many users.

2. Copy the pdf to your local hard drive (example: desktop). There may be problems posting a shared pdf directly from the R drive.
3. Several preference settings may need to be adjusted for Adobe Shared Reviews. See the following link.
https://www.dot.nd.gov/manuals/design/caddmanual/UG_Meetings/Adobe%20DC%20Settings%20For%20NDDOT.pdf
You may need to exit and reopen Adobe Acrobat to process all preference changes.
5. Within the pdf document to be submitted as a shared document, select “All tools > Send for comments > Send for shared commenting”. The “Send for Shared Review” dialog should open.
6. Select the “Automatically collect comments on my own internal Server” option. Then click the “Next” button.

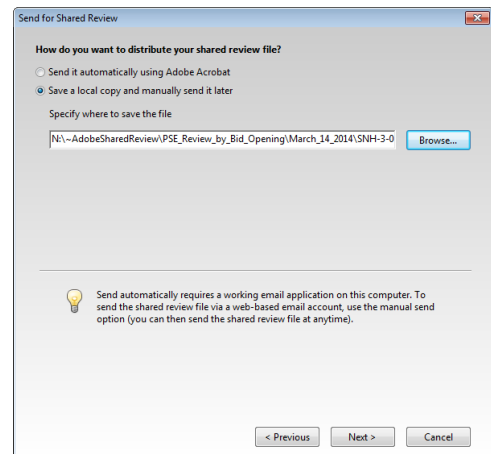


7. Select the “Network folder” option and use the Browse button to navigate to the designated folder discussed in step 2. After the path to the shared network folder has been designated, click the “Next” button.

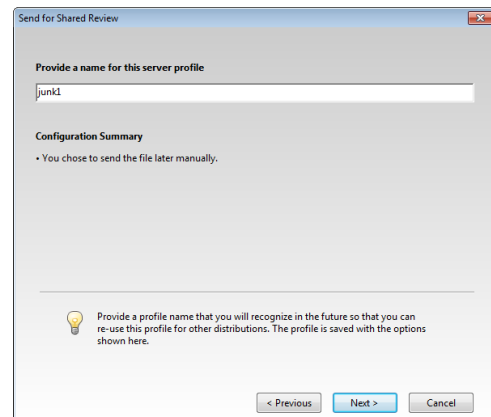


8. Select “Save a local copy and manually send it later”. Save the local copy in the same folder used above.

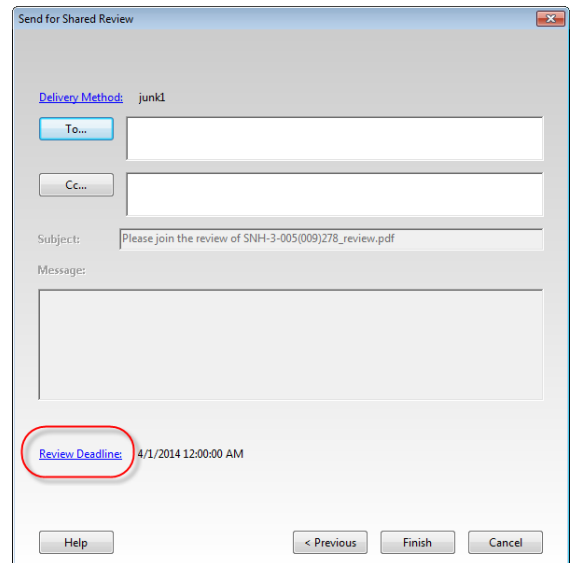
Notice that default name used for the shared review pdf is the original name with “_review” appended. Click the “Next” button, after the path has been specified.



9. The next dialog box is used for saving and naming the settings used for this shared review (server profile). Usually these settings for PS&E reviews won't be used twice because folder path for each PS&E should be unique. Therefore, the name of this profile really isn't important. In the screen capture, “junk1” is used. After a profile name has been specified, click next.



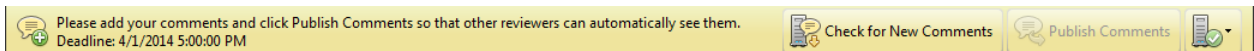
10. The “Send for shared Review” dialog provides options to send an email. Don’t use Adobe for your email. Leave the “To” field empty. Click on “Review Deadline” to adjust the deadline for the PS&E Review. The deadline for all PS&E reviews shall be 5:00 pm on the first business working day before the PS&E Meeting. Example if your PS&E is on Monday, the deadline for the shared review PS&E comments shall be 5:00 pm on the Friday before the meeting. Click Finish after the Deadline has been adjusted.



11. You may be prompted to publish existing comments within the document. This includes publishing stamp comments. If the person that places the stamp within a document is different than the person creating the shared review document, the person creating the shared review document should be prompted to publish the stamp (comment). Be sure to select “yes” when prompted.



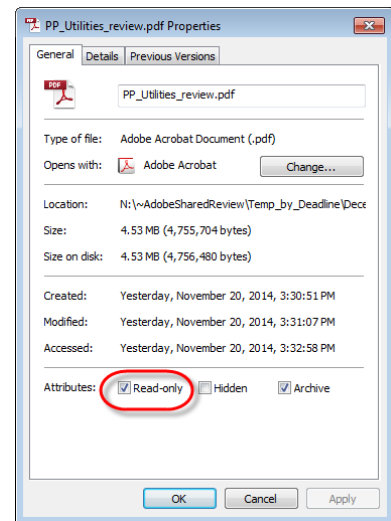
12. At this point, Adobe should have posted your document for review with the appropriate settings. An additional folder and resource files will also have been created in the same folder as you review document. Remember that the Adobe shared review version is different than your original pdf. Use Windows Explorer to confirm that the shared review document has been correctly posted. You should be able to open the review document and see the ribbon prompting you for comments by a specific deadline.



13. The shared review document file properties should be manually set to read only before inviting reviewers to comment. Only the pdf file should be set to read only. The folder properties should be left alone.

In Windows Explorer, right click on the file and select “Properties” from the popup menu. Within the file properties dialog set (check) the Attribute for “Read-Only”.

This is a precautionary measure that is intended to avoid complications with people resaving the document in the original location. If someone resaves comments directly into the original document, it may become difficult for people to change or delete their prior comments.



14. Use Microsoft Outlook to send invitations to comment on the Adobe Shared Review document.
- A “meeting” invitation should be used for a PS&E “meeting”. All PS&E invitations should use the text on the following page as a template.
 - An “email” should be used to invite people to comment on a draft environmental document such as a draft documented categorical exclusion (DCE) since there is no meeting. Use the template for Draft DCE. The template can be found after the PS&E template.

Templates for Microsoft Outlook Invitation and Emails

Edit text in red.

PS&E

Please review and comment on the PS&E document linked below.

Project: **SS-6-015(013)114**

PCN: **16799**

Bid Opening: **May 9, 2014**

Plan Completion Date: **March 14, 2014**

Project Location: **East Junction ND 18 East to I-29**

Project Scope: **Slope flattening, box culvert extension, HBP mill and overlay, lighting**

PS&E Meeting Schedule: **March 5, 2014 from 1 pm to 5 pm**

Location (Chaired From): **Room 407 North of the Central Office**

PS&E Commenting Deadline via Adobe Shared Review: **March 4, 2014 at 5 pm**

Hyperlink:

N:\~AdobeSharedReview\PSE_Review_Bid_Ready_Month\Year-Month\PS&E Plan Set_review.pdf

If you would like additional instructions on commenting via Adobe Shared Review, review the following resources.

<https://www.dot.nd.gov/sites/www/files/documents/construction-and-planning/SharedReviewForReviewers.pdf>
R:\SUPPORT\How_To\AdobeSharedReview\ASR_Review.wmv

Documented Categorical Exclusion (DCE)

Please review and comment on the Draft DCE linked below. Direct comments towards your vote for alternatives and include your reasoning for your preferences if applicable. The main reason for soliciting comments on the Draft DCE is to get comments and recommendations on the alternatives.

Project: **SS-6-015(013)114**

PCN: **16799**

Bid Opening: **May 9, 2014**

Plan Completion Date: **March 14, 2014**

Project Location: **East Junction ND 18 East to I-29**

Project Scope: **Slope flattening, box culvert extension, HBP mill and overlay, lighting**

DCE Commenting Deadline via Adobe Shared Review: **March 4, 2014 at 5 pm**

Hyperlink:

N:\~AdobeSharedReview\Temp_by_Deadline\Year-Month\User Defined\DCE_review.pdf

If you would like additional instructions on commenting via Adobe Shared Review, review the following resources.

<https://www.dot.nd.gov/sites/www/files/documents/construction-and-planning/SharedReviewForReviewers.pdf>
R:\SUPPORT\How_To\AdobeSharedReview\ASR_Review.wmv

Special Instructions for Consultant Projects

The NDDOT shall host shared reviews on the NDDOT N drive. Consultant servers, adobe.com and other cloud services shall not be used. This requirement will provide specific work environment conditions.

The consultant will not have immediate access to posted comments. This condition will provide an opportunity for technical support staff to review comments before the consultant does.

The technical support staff shall use their discretion on whether to provide intermediate comment summaries or partially reviewed documents to the consultant during an ongoing review.

The consultant should not act on any intermediate comments (summaries – partially reviewed documents) before the PS&E meeting unless the NDDOT technical support person has recommended proceeding. After the PS&E meeting, the consultant should act on all comments except items that the technical support has identified as needing additional review.

Workflow for Consultants

1. The consultant sends a PSE pdf to technical support.
2. The technical support person sets up the PSE Adobe Shared Review File (PSE-ASRF). Consultants should not set up their own shared review.
3. The technical support person sends out Meeting invitations and a link to the PSE-ASRF with deadline.
4. The technical Support person will archive the PSE-ASRF shortly after the deadline and deliver the electronic file to the consultant. This step may be done before or during the PS&E meeting.
5. The consultant shall make arrangements to have a laptop accessible (with adobe reader or higher) at the PS&E meeting.
6. At the PSE Meeting the consultant will record verbal comments, and/or resolutions agreed upon in the Shared Review comments. Consultant will add verbal comments and comments received in other formats such as emails to the archived PSE-ASRF.
7. The consultant shall document their response to every comment within the archived PSE-ASRF. This file shall be submitted to the technical support person before the proposed final plans are submitted.
8. Technical support will redistribute the archived PSE-ASRF with Responses from the Consultant to the original commenters.
9. Both the technical support person and original commenters will review the proposed resolution to their comments. They will notify the consultant if the proposed resolution needs adjustment or refinement (review, return, resubmit process until final approval).
10. The technical support person will save the archived PSE-ASRF with responses from the consultant in the applicable r-drive project folder.

Adobe Shared Review folder Structure and Purging

The directory “N:\~AdobeSharedReview” is intended for Adobe Shared Reviews only. This folder structure was designed for easy and apparent maintenance. All folders in this directory must be built and named based on a purge schedule.

This folder structure is built with a purge schedule to be implemented by administrators, but users are strongly encouraged to process and purge their own folders and files as soon as possible in order to minimize storage requirements.

Three folders are supported:

- N:\~AdobeSharedReview\Temp_by_Deadline
- N:\~AdobeSharedReview\PSE_Review_Bid_Ready_Month
- N:\~AdobeSharedReview\Folders_To_Be_Deleted

Two sub folders must be used under "Temp_by_Deadline"; (Year-Month)\(User Defined). No other folders will be allowed. Users can use their discretion to name the subfolder under the "Year-Month" folder. The deadline for your review should be used to determine what "Year-Month" folder to use. If you have a non PS&E document that has a deadline of March 31, 2014 then it should be placed in a subfolder under "2014-03".

Two sub folders must be used under “PSE_Review_Bid_Ready_Month”; (Year-Month)\(PCN). No other folders will be allowed. As implied by the parent folder name, the Bid Ready Month for the project should determine what subfolder should be used.

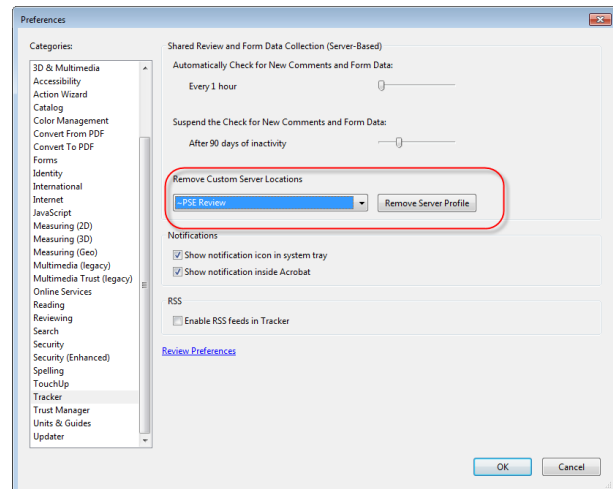
All Adobe Shared Review folders and files will eventually be administratively purged off the N drive.

Folders will be moved to “N:\~AdobeSharedReview\Folders_To_Be_Deleted” one month after the respective month has passed. Once moved, these files will be held for a short recovery period and then they will be completely deleted. The typical recovery period is one month after they have been moved.

Deleting Adobe Shared Review Server Profiles

Adobe saves your settings used for shared reviews in a “Profile”. These “Profiles” are not usually reused and you may want to delete them.

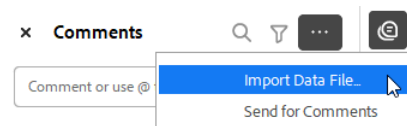
1. Open Adobe Acrobat.
2. Select Menu > Preferences.
3. From the Preference dialog, select “Tracker” from the Categories panel.
4. Remove Custom Server Locations as desired.



Importing comments submitted as an “fdf” file

Some projects may involve people, like city officials and FHWA, who don’t have direct access to the N drive on the NDDOT network. Comments from these people will need to be imported by the lead designer. Comments from these people can be imported from their commented pdf. Sometimes these comments are easier to transmit as an fdf file because the file is smaller and can be emailed. For a review on creating a fdf file see the section under “Reviews” > “How do I participate in a Shared Review If I don’t have Access to the NDDOT Network?” The following steps are a continuation from this workflow.

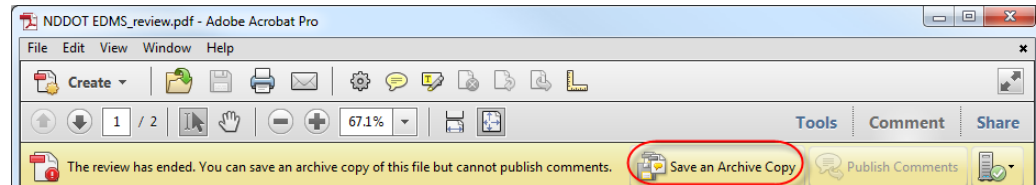
1. After the lead designer receives the fdf file, they should then open the original shared document and import the comments. This is done by using the “Import Data File...” tool. This tool is accessible from the options icon on the Comments List.
2. If the comments were imported into a copy of the original shared document, they will also need to be published so that they are included in the shared review process. Use the publish button to submit the comments into the shared review process.
3. The lead designer should ensure that the comments are saved into the shared review document before deleting the fdf file. The fdf file should be deleted when the shared document is saved as an archived document.



Addressing PS&E comments

You may have comments and notes that were not submitted as part of your shared review. This information should be attached to the shared review document even if the review is over. This should be done in order to create a comprehensive record of the review.

Once all PSE comments are included in this document, it should be archived. Open the review pdf and



select "Save an Archive Copy". This combines all the comments into one document. The archived document should be moved to the R drive and stored in the project "**eplans>ps_e**" folder.

Within the pdf, you can add responses during and or after the review (pdf is archived). If you respond before the pdf is archived, your responses will be saved with the comments like everyone else's. If you respond after the file is archived be sure to resave the document.

Your PS&E review comments should be saved as an archived version and moved to the R drive before the plan completion date.

Send a hyperlink of the archived document to whoever needs the comments and responses.

After your shared document is archived and moved to the R drive, the corresponding documents in the N:\~\AdobeSharedReview\... folder should be deleted. Be careful to delete just your project pdf and comment folder. Subfolders are required for each shared review and should simplify this purge.

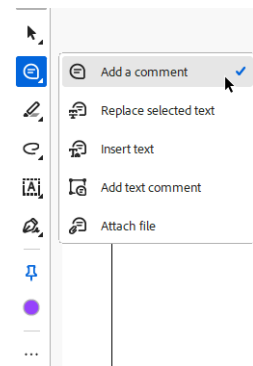
The "N:\~\AdobeSharedReview\..." is not a long term storage area. These files may be purged on a regular interval.

Reviewers

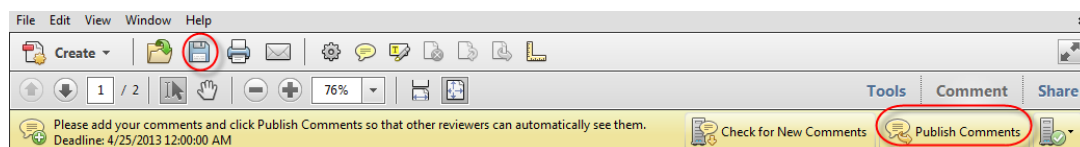
How do I comment through Adobe Shared Reviews?

1. You may receive an email from the originator providing a link to the shared pdf document. Use this link to open the shared PDF.
2. If you weren't directly invited to comment on the shared pdf, you may still be able to comment. You will just have to find and open the shared PDF. Note there is an important difference between the shared PDF and the original one on the "R" drive. The pdf set for shared review is partially locked. Pages can't be inserted or edited, but comments can be added and pages can be attached. The original information reviewed is preserved. Multiple people can open and comment on the shared version at the same time.
3. Use the Adobe tools such as "Add a Comment" to make your comments. Additional tools are available for markups such as draw and highlight.

The "Add a Comment" tool is preferred over the "Add Text Comment" tool. "Add a Comment" takes up less room than text boxes. "Add a Comment" collapses into a small icon. If one page uses multiple text boxes or extensive comments, it may be difficult to find open page space for your text box. "Add a Comment" also allows for organized responses. Right click on the existing comment and select reply. Using this method of replying to comments it is easier to identify who commented first, second and so on.



4. Your comments can be saved to another pdf file and or they can be published. **There are important differences between saving and publishing.** Publishing posts your comments for other reviewers. When you publish your comments they are written to an xml file which is located in a project sub folder in the same directory as the shared pdf. As a reviewer you usually don't need to resave the pdf. The pdf needs to be resaved if someone is going to comment on the document when they are not connected to the shared folder – network (N:\~AdobeSharedReview\...) or if they want to save draft comments that are not ready to be shared.



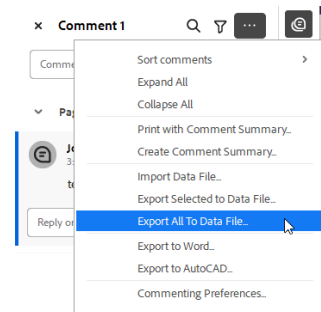
The shared pdf version can be copied to other locations with the same or different name. It is important to publish your comments so that other reviewers can see your comments. If you create comments and save them to a different document, without publishing them, the other reviewers will not see your comments until they are published.

Try to publish comments as soon as possible. This will provide more time for collaborating on the review process. Submitting comments early also gives the lead designer time to prepare responses.

How do I participate in a “Shared Review” if I don’t have access to the NDDOT Network?

1. If you don’t have access to the shared folder, the lead designer should make the entire shared pdf available. This is usually done through an ftp site. The key here is to use the shared pdf version. Comments from the non-shared version could work but there could be numerous complications. Example, Adobe reader can not initiate comments. Adobe acrobat can initiate comments through the share review process so that the free version of adobe reader can make comments.
2. After comments have been made on the document, the entire document with comments could be sent back to the lead designer. This would work but it isn’t the preferred method. Documents like PS&E plan sets are usually large. Transferring large files usually precludes email and requires the use of FTP sites. PDF comments can be exported independently of the original document. For example, an original document may be 200 MB. The entire document needs to be sent to the reviewer, but the review doesn’t need to return the entire document if they know the originator has access to the original document. The reviewer’s comments, if extracted from this document, may only be 200 KB. This size of file could then be emailed. The lead designer could then import the comments back into the shared review process.

After the reviewer has finished commenting within the pdf, the comments can be extracted from the “Comments List” by selecting the options icon and using the “Export All to data File...” tool. You will be prompted for a name and location for your exported comments file. This will have an fdf extension. The fdf file will be much smaller than the original pdf and can be emailed back to the lead designer. At this point the review has completed their part of the workflow.



The fdf import process that the lead designer should use is documented under the section “Lead Designers “> “How do I import comments submitted as an “fdf” file?”

Tracker

The tracker tool can be used to track Adobe shared reviews. This tool is accessible from Menu > View > Tracker.

The tracker should list the shared reviews “sent” and “joined” on the left panel. Single click on the name of the document to get more information on who is participating in the review, how many comments they have made and how many of these comments are new since you have last reviewed the document.

