Tips & Tricks

Certification Numbers

On forms requiring a signature and/or certification numbers, please make sure to include a typed name in the *prepared by* field as well as a certification number.

Digital signatures

For a document from an ODOT POR with digital signatures from outside of Doc Express (DocuSign, CoSign, Adobe Fill & Sign, etc.), follow these steps:

- Open pdf.
- Select File, click Print.
- Use the dropdown box below the Print button to select **Print to PDF, Adobe PDF** or **PDFCreator** as the printer.
- Click Save.
- The live file should be saved into ProjectWise in the Construction Engineering folder of this project to preserve the verifiable file.
- Upload the document into Doc Express and comment that the live file will be kept in ProjectWise. It is now available for the crew to use in the field.
- You may also add the email from the POR as a supporting document showing their approval.

Getting a Digital Signature from Doc Express for use with Contract Change Orders
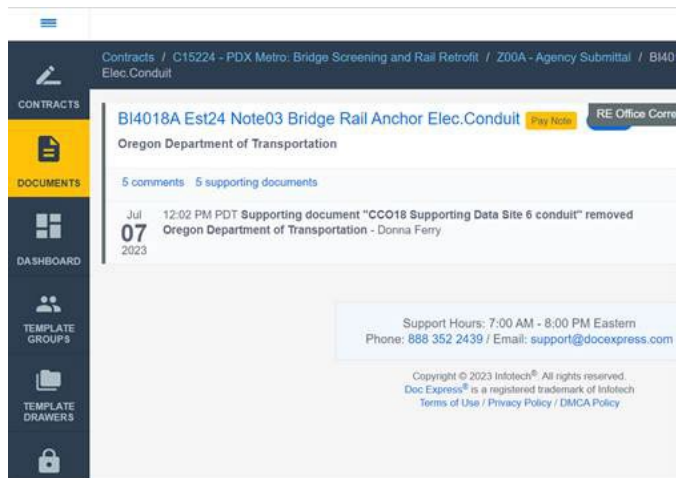
This digital signature is for ODOT staff required to sign Contract Change Orders. These are the only documents required to be signed digitally. All other documents are electronically signed in Doc Express.
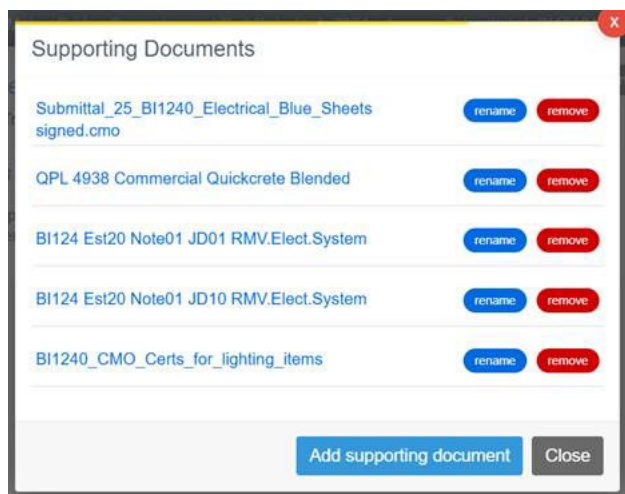

Doc Express Digital
Signature guide.pdf

Supporting Docs update/delete

Go to the document in Doc Express and click on Supporting Documents

The list of supporting documents will show up:

https://docexpress.com/annotations/549777

You can choose to Remove or Rename each one 😊

If you rename, make sure you click on the save button once you are done.

Documents

You may upload any document that your reader can open, but we encourage you to stick with Microsoft Office products and pdfs as your main choices for documents.

All documents should be turned into flattened pdfs before uploading into Doc Express. Uploading a flattened pdf creates a signature page at the end of the document in Doc Express. The signature page is important when the ODOT staff is reviewing the document at the end of the workflow. (See flattening pdf instructions under **PDFs** in this document.) You may upload any Microsoft Office (Word, Excel, PowerPoint) product file as a supporting document. You do not have to turn a supporting document into a pdf. Photos may also be added as supporting documents. Use names for your supporting document to describe it for others to understand.

You may combine pdfs into one pdf and upload the final combined pdf as a document.

You may not upload a zip file or an Adobe Acrobat portfolio as a document. Please upload one of the files/pdfs as the document and the remaining files/pdfs as supporting documents.

Electronic signatures

Acceptable on payroll received from the Prime and their subs.

Export Log

The Export Log is now available for ODOT users and Contractors.

This provides a snapshot of a drawer or of an entire contract to show the activity status of documents. Click on the grey Actions button on the drawer (or on the contract) and choose Export Log from the pull-down menu. An Excel file titled log.xlsx will appear for download. Clicking on the link will open the file in Excel on your computer. Included in the Export Log are the Contract, Drawer, Description and the date the log was exported.

Title, Types, Submitted date, Completed date and Due dates are columns in the spreadsheet. You can sort the sheet in any way that works for you.

If you print the contract export log, each drawer is viewable by clicking the corresponding tab at the bottom of the spreadsheet.

This is a great way to see where a document is in the workflow or to check that the correct items have been placed in the proper drawer. You can save this file in your share drive or just print it for your immediate use.

We suggest you run the log at least once a week to review the documents in your contracts.

Multiple Document Upload

All documents must be the same type when uploading multiple documents.

All documents must be pre-named with the correct naming convention. If not, you will have to rename the files once uploaded to match the correct naming convention. At this time, only ODOT users can rename a document.

Naming Conventions

It is important to be consistent when naming documents to allow the document to be searchable. Please make sure when entering the Bid Item #### that you write BI#### with no space between BI and the number (e.g., BI00260).

Check naming conventions for each document on the Master List for your contract. The Master List is found in the Standard Documents contract in the appropriate drawer for your Master List, either 2018 (for projects from January-December 2018) or 2019 (for projects beginning after January 2019).

PDFs

Open a dynamic form in Adobe Acrobat Pro or Adobe Acrobat Reader for PCs and Laptops

Some pdfs are considered "dynamic" forms and offer additional features not found in "static" or traditional pdfs. When a dynamic form is opened outside of Adobe Acrobat Reader or Adobe Acrobat Pro DC, a "Please Wait" document will show. Follow these instructions to open the form.

1. Open form from Doc Express Standard Documents Forms drawer.
2. A "Please Wait" document will appear.
3. Click on the Download button in the upper right corner (cloud with arrow).
4. In Chrome, right click on the document icon in the lower left corner of the screen.
5. Select Open With and choose Always Open with Adobe Acrobat.
6. The form will open in Adobe Acrobat and you will have changed the default pdf reader for Chrome on your computer to Adobe Acrobat.

You should only have to do this the first time you open a "dynamic" pdf in the Chrome browser. Internet Explorer's default pdf reader is Adobe Acrobat.

Please contact the ODOT e-Construction team if you have any issues with pdfs.

Make Adobe Acrobat Reader or Adobe Acrobat Pro the default printer

In Chrome, right click on the download icon for the document in the lower left screen. From the pop-up menu, choose Always Open with Adobe Acrobat.

If you do not need the expanding fields for your form, you may use the iPad compatible versions if offered. This version is a "static" version of the form and will not allow you to add/subtract rows and will not expand fields as you apply additional text. All other properties of the form are the same as the dynamic version.

Flattening a fillable pdf (how to make a document fixed, so no one else can add/change information)

1. Open fillable form.
2. Add appropriate data.
3. Select File.
4. Select Print.
5. Select the PDF printer. (For ODOT, Adobe PDF printer is installed automatically with Adobe Acrobat Pro DC. For Contractors, if you do not already have an installed PDF printer, there are many free PDF printer drivers are available for download from the Internet.)
6. Select OK.
7. Specify location to save the printed, "flattened" version of the form.
8. Select Save.

IPad Instructions

If you are using an iPad or Apple product, there are specific instructions for pdfs as well as additional iPad instructions available. In Doc Express, go to the Standard Documents contract and tap on the Doc Express User Guide drawer. The iPad User Guide document has tips and tricks for you to work with your iPad in Doc Express.

Publishing a Document = Copying a Document

Region Assurance Specialists will publish any documents that they review. A goal for other documents would be to have whoever has the last transition in the workflow is responsible for Publishing the document unless otherwise demonstrated on the Master List (e.g. Subcontracts). *(For DocExpress projects. AASHTOWare Project contracts have a different process.)*

Revert transition

If it is available for your document, you will find Revert Transition listed under the document's Action button.

To revert a transition means you revert the last transition and return the document to the transition before.

For example, after Submitted, if you selected Accepted by Contractor, but you intended to select Approved by Contractor. You can use Revert Transition to return your document to Submitted. The audit trail will reflect this change, but you will be able to then choose Approved by Contractor and continue with your correct workflow.

If it is necessary to replace your document, please transition the document to the Please Archive (add "why" comment) step. Contact a System Administrator if you need assistance or if this transition is not available.

Remove a document

If it is available for your document, you will find Remove listed in red under the document's Action button.

As long as the workflow has not continued and no other person has made a comment or transition to a document, it is possible for the person who submitted the document to remove it when it is in the Submitted status. Remove will only be visible to the original author of the document under the Actions menu. It is only available while the document is in the Submitted status and no other activity on the document has occurred.

Once the next step in the workflow has occurred or the document has received an additional comment or supporting document, it is no longer possible for you to remove your document. If it is necessary to replace your document, please transition the document to the Please Archive (add "why" comment) step. If this transition step is not available to you, please send an email to ODOT eConstruction asking for that transition step to be added (identify the Contract and drawer where needed). A System Administrator will then Archive your invalid document. Then, you will have to Submit your document again to create a new workflow.

System Administrators

Listed below is some helpful information regarding Agency System Administrators. If you have any questions, please email odoteconstruction@odot.state.or.us.

- Documents that have been published will be automatically archived by System Admin.
- Documents that have been transitioned/marked for Archiving will be automatically archived by System Admin.
- Documents that have been sitting in Ready to Publish for longer than 4 months can be published by System Admin.
- Contracts will be exported and locked once the EA is closed. If a document needs to be added after the fact, System Admin will add that document to the locked contract.