Remote Plan Routing Instructions-Revised (see *First Issuance* version for first issuances)

This process has been broken down into 4 main stages: Routing Sheet Setup, Routing Email, Adobe Sign Signing & Stamping, and Final Project Folder Configuration & Issuance. If no changes are needed to the title sheet (from adding a lot of work or additional stamps), the Adobe Sign Signing & Stamping stage can be skipped

The first stage is setting up the routing checklists before sending out any emails. All the other stages involve an email to a different group of individuals tasked with advancing the plan routing. Beginning the email subjects with one word as shown in parenthesis will make locating and tracking the plans throughout the process much easier for all participants. All emails should be sent "High Importance"

Routing Sheet Setup

1. Browse to the revised plan PDF folder, create a subfolder called "Routing". For Example, M:\DESIGN\Projects\12887\Plans Specs Est - FINAL\Revisions_Addenda\2020 08-26\Routing\
Copy the correct file from M:\C3D\Workflows\Remote Plan Routing\ for the project type (private or public) and issuance type (plan or revised).
2. Paste the Excel file to the Routing subfolder setup in step 1. Keep the most up to date copy of plans here and email updated plan PDFs from here.
3. Rename the file to include project number, name, & revision date:
12887-BirchwoodPointSouthPh3_2020-08-26_RevRouting.xlsx
4. Fill out routing sheets. Start with the INPUT PROJECT INFO tab and then go other tabs again to complete. Initial items you have completed

Routing Email ("planroute")

5. Send email with High Importance priority with standard subject as shown below to everyone who needs to signoff. Including "planroute" as one word makes any routing emails easily found through email search. The last portion of email subject describes what type of plan issuance it is.
    a. "planroute 12887: Project Name (Revised Plan Issuance)"
    b. "planroute 12887: Project Name (Full plan, Revision of Utilities-Only)"

6. Attach the plans as a PDF. Include the appropriate file path from step 1 to the routing spreadsheet.
7. Reviewers open attached PDF. Any changes to the plans should be a reply all with a new attached PDF reflecting the changes.
8. Reviewers type initials into excel once they are satisfied with their respective items. **Open, initial, and close right away. Others can't edit excel file while you are in it. Email project Engineer once you have signed off.**
9. After all reviewers have signed off checklist, print routing sheets all to one PDF. Save this PDF in main folder (see image in step 12b)

Adobe Sign Signing & Stamping ("planstamp")

10. Send an email to Christy Bachmann with same subject format as step 5 but change planroute to planstamp. Send high importance. CC all Engineers who need to stamp and attach final routed plan.
11. Upon everyone stamping, you will receive an email from Christy with a path to the secure PDF and unsecure PDF in plan vault.

Final Project Folder Configuration & Issuance ("planissue")

12. Rename the plan PDF by adding "-unlocked" to the end. This unlocked revision has the revision clouds still as Adobe comments that have not been printed into the file.
    a. Routing folder configuration
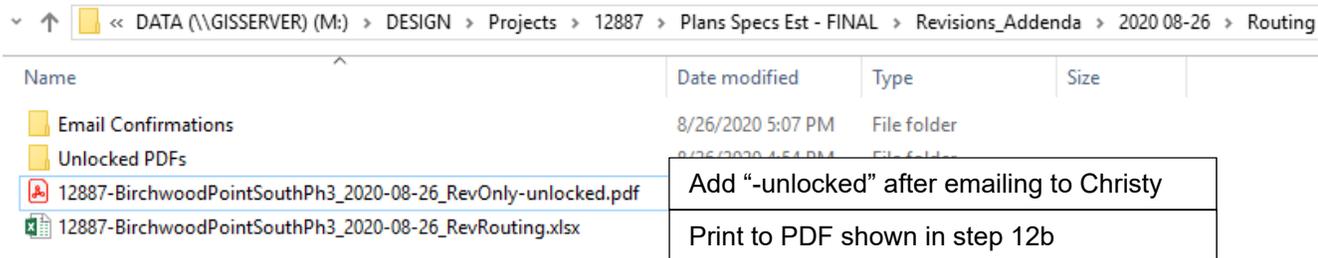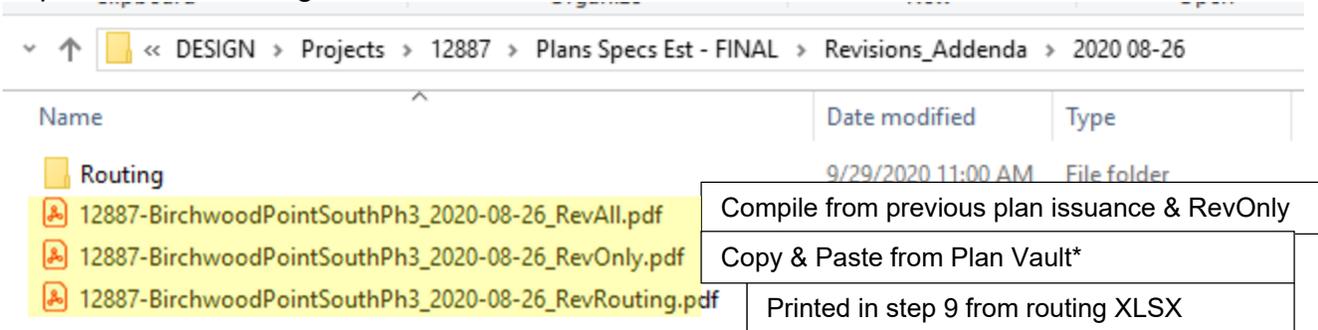
13. Email to Heidi, Johanna and Lesley PDFs of the final plans with all sheets compiled, final plans with just the revised sheets, and the routing sheets. These are highlighted in yellow in step 12b and named logically.
14. Use same email subject but update "planstamp" with "planissue". Email should be sent high importance
15. Include all additional contacts for private development team to include on plan notice in body of email.