Bluebeam User Guide

Managing Bluebeam
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Design/Bluebeam Review Process

Consultant provides all files on PDF format following file naming convention to PM electronically or on CD

PM
- PM Reviews files
- Updates Pinfo
- Creates Bluebeam session
- Imports PDFs from Pinfo
- Sends session e-vites to Reviewers

Reviewers
- MassDOT Reviewers receive Bluebeam e-vites
- Review Submittal PDFs
- Reviewers must resolve any conflicting comments with other reviewers

Does this review need Supervisory Approval?

Supervisor
- Supervisor reviews team member's comments and makes recommendations
- Reviewer updates per Supervisor's comments

PM
- PM holds Comment Resolution meeting
- Coordinates resolution and disposition of comments

Disposition of comments in Bluebeam, closes session, and posts documents and Bluebeam report to Pinfo

Consultant receives e-vite to review comments
Bluebeam Functional Area/Activities and Roles

<table>
<thead>
<tr>
<th>Functional Area/Activities</th>
<th>PM</th>
<th>Reviewer</th>
<th>Supervisory Review</th>
<th>Consultant</th>
</tr>
</thead>
<tbody>
<tr>
<td>Creates Session</td>
<td>Y</td>
<td>N</td>
<td>N</td>
<td>N</td>
</tr>
<tr>
<td>Ability to Comment on Documents via Bluebeam e-vite</td>
<td>Y</td>
<td>Y</td>
<td>Y</td>
<td>Y</td>
</tr>
<tr>
<td>Ability to Add Additional Reviewers to the Session</td>
<td>Y</td>
<td>N</td>
<td>N</td>
<td>N</td>
</tr>
<tr>
<td>Ability to Delete or Modify Other Reviewers’ Comments</td>
<td>N</td>
<td>N</td>
<td>N</td>
<td>N</td>
</tr>
<tr>
<td>Ability to Status Review; per e-vite</td>
<td>Y</td>
<td>Y</td>
<td>Y</td>
<td>Y</td>
</tr>
<tr>
<td>Ability to Open and Close Session</td>
<td>Y</td>
<td>N</td>
<td>N</td>
<td>N</td>
</tr>
</tbody>
</table>

Business Roles and Definitions

**Project Manager** – Design Project Manager assigned in Project Info for a specific Project. Responsible for the management of Submittal Reviews utilizing Bluebeam.

**MassDOT Reviewers** – MassDOT technical subject matter experts who have been identified by discipline.

**Consultant** – Selected Designer of Record hired for a specific Project, responsible for Design.

**Supervisor Review** – When a Reviewer statuses “Pending Supervisor Review” Supervisor will review sessions and recommend modifications or approval for the Reviewer to implement.
**Bluebeam Overview**

Bluebeam is an external collaborative tool that allows both MassDOT and External Consultants the ability to manage, comment and provide updates to documents and drawings in real-time during the 25%, 75%, 100% and PS&E review phases. This process allows reviewers to follow the changes to the documents and drawings and expedites the review time, as it is all captured electronically.

Bluebeam is the electronic replacement of MassDOT RCR Excel sheet.

- It is Cloud based
- Two versions
  - a) Bluebeam Revu (for PMs)
  - b) Bluebeam Vu (for Reviewers)

Accessed through an invitation link from the Bluebeam session creator.

Access available from Bluebeam website using the session number.

**General Guidance**

*What are studio sessions?*

Sessions enable document-based online collaboration. They are accessible through the Revu and Vu interface. Only the host needs a Revu license to initiate a Studio Session, and all invited attendees can participate in the Session through Revu, Revu for iPad or even our free PDF viewer, Bluebeam Vu for Windows and iPad.

Each session is unique to a specific Submittal within a Project/Contract

Pinfo – Pinfo entries and responsibilities are still mandated.
Important

- Never work “Offline”

The Work Online icon will have a small green sphere and the plug image will be connected.

The Work Offline icon will have a small red sphere and the plug image will be disconnected.

- All “General Comments” should be posted on the first page of the document set.
- Only the creator of the information has the ability to delete.
- It is critical to only use objective language when writing a comment or replying to one.
Designer/Consultant Role

Design Submission
All files to be reviewed shall be submitted to the MassDOT PM in .pdf format. All other file types shall be submitted as required by MassDOT.

Files to be reviewed shall be named with the following prefixes. The file name after the prefix can be determined by the Consultant. For example, 001_XXXXXX_Bridge B-01-001 Sketch Plans

Naming convention prefix:

- 000 – Table of contents
- 001 – Plan submittals
- 002 – Utilities
- 003 – ROW
- 004 – Environmental
- 005 – Reports
- 006 – Specifications
- 007 – Estimate
- 008 – Schedules
- 009 – Other

Provide a Table of Contents with the submission which describes all the files provided in the submission.

When plotting AutoCAD drawings to .pdf, prior to plotting, set EPDFSHX to 0 within AutoCAD.

All other .pdf files shall be “flattened” prior to submitting.

Highway plan sets shall consist of a single volume and be submitted as a single .pdf. Color utility plans shall be included within the highway plan set in lieu of black and white plans.

Consultants Respond to Comments

After the review is complete the MassDOT PM will invite the consultant to the review session to respond to comments. While comments are being responded to, only the consultant and the MassDOT PM will have access to the review session. Access to the session for the MassDOT reviewers will be denied while comment responses are being developed.

The consultant will respond to comments by setting a status to the comment within Bluebeam and providing a written response to the comment within Bluebeam. The status can be set to the following: Accept, Disagree, Will Evaluate, or Delete Comment.

1. To set the status of the comment, click on the comment in the comment log, and from the Status pull down at the top of the comment log, set the status of the comment.
2. To provide a written response to the comment, click on the comment, and then click on the Reply button at the top of the comment log. Provide a written response in the text box.

3. When the comment has been responded to, the response will appear below the comment in the comment log.

After all comments have been responded, the consultant will coordinate with MassDOT PM to set up a comment resolution meeting (CRM). During the CRM, Bluebeam will be utilized to review comments/responses as needed. Note that comments may be sorted by Author, Page, Status, etc. After comments/responses have been resolved, the Consultant will modify any responses as needed and then notify MassDOT PM when completed.
Project Manager Role

Getting started

- The Consultant will submit Submittal Documents for review using the defined File Template

- The PM is responsible for ensuring adherence to the directed file naming convention

- The PMs will fully utilize the Design Project Checklist in PDGG to align with the Submittal Review for the Project

- The PM will be responsible for developing a specific submittal distribution review list

- The PM will be responsible for managing and maintaining access for the internal MassDOT Reviewers and the External Consultant Reviewers

- The PM is responsible for setting and managing the Submittal Review Time Line, using Bluebeam

- Recommended language for the “Message to Reviewers”

  Reviewers,
  
  A Bluebeam Studio review session for project 606060 has been initiated. Please conduct a review of the 25% submittal. Comments are due in 30 days on June 16, 2018. No additional comments will be accepted after this date and no comments will be accepted outside of Bluebeam.

  Alex Murray x8811

- The PM is responsible for reviewing all responses, and coordinating any conflicts

- The PM is responsible for managing and facilitating “Comment Resolution Meetings”

- Recommended tools online meeting/conference tools:
  - Conference room meeting with computer and smartboard
  - GoToMeeting
  - WebEx

- The PM is responsible for ensuring all Reviewers have completed their review; within the defined time

- The PM will Finalize Sessions and update status to “Finish”

- The PM is responsible for updating ProjectInfo and updating the ProjectInfo File Repository
Creating a Session

To begin creating your new session, select “New Session”

1. Name your session. Sessions must be named with the Contract No., Submittal number and description; click “OK”, i.e. For example, 001_XXXXXX_Bridge B-01-001 Sketch Plans
2. The “Session Invitation” screen will pop-up. Project Manager will need to refer to the Submittal Matrix to determine reviewers. It is highly recommended for the PM to develop their own Submittal Review List.
3. To delete an email address, click on the email address you wish to delete and click the “delete” button.

4. To correct an email address in the list of invitees, select the e-mail address and click on the modify button.
5. Once all invitees have been added, click “OK”. A confirmation message advising you the invitation has been forwarded, will pop-up.

Your sessions has been created!
MassDOT Internal Reviewers

Procuring access to Bluebeam

1. Users must request Bluebeam Vu via MassDOT Help Desk Ticket e-mail: dotservicedesk@state.ma.us

Managing your Account

Please be aware, the e-mail address you provide for the Bluebeam account must be a MassDOT email address. E-mail address must include "@dot.state.ma.us" in order for your account to work properly. At this time, please create your username.

Updating User Name

To create a new username with the corrected e-mail address follow the steps outlined below.
To create the new account: Enter e-mail and password; click OK.
E-vite To Review
Reviewer will receive e-mail invitation (e-vite) to join the review process. To open the session and join the review process, simply click on the Session ID No. and you will be directed to the Bluebeam session.

To join the review session, click on the Session ID No.
Firewalls and web security may ask for confirmation when trying to open the Bluebeam session. MassDOT reviewers may have to confirm the prompts shown below. Please click “Allow” on both prompts to open the session.

In some cases, users may have to copy and paste the Bluebeam Session ID included in the e-vite.
Session Status
Each Reviewer is responsible for setting their respective Status.

1. Reviewing
2. Waiting
3. Pending Supervisor Review
4. Finished

Once the session is opened, Reviewer must set the status to “Reviewing” and once the review is completed, change to “Finished”.

Status Definitions

1. **Reviewing**: Reviewer is currently reviewing documents during defined review time line.
2. **Waiting**: Reviewer has reached out to other Reviewers and is waiting for feedback.
3. **Pending Supervisor Review**: Junior Reviewer has informed the Supervisor, their review is complete, pending approval from Supervisor to status as “Finished”
4. **Finished**: Review is complete – Review status “Finished”.

![Image of Bluebeam interface](image-url)
Panels
Panels for the Revu interface are located at the left, right and bottom and can be opened and closed to expose or hide as needed. These panels are customizable, additional tabs may be added from the “View> Tabs” menu.

Left Panel Tabs
1. File Access
2. Bookmarks
3. Thumbnails
4. Tool Chest

Right Panel Tabs
1. Properties
2. Studio
3. Record
4. Notifications
5. Pending

Bottom Panel Tools
1. Markups List Toolbar
2. Navigation Bar
Commonly Used Markups

Markup menu

Click Markup

The Markup commands will appear in this section

Text menu commands:

The “Note” tool allows you to place a pop-up text note on a document. **Notes and comment boxes do not print by default. To print notes, select “Print Pop-ups” in the Markup Preferences.**

A Note will appear on the PDF as a small yellow sticky image. Double click on it to open the comment.
Shapes menus commands:

The **Cloud+** command is commonly used to create a cloud with a text box. (Simply press the letter “K” on your keyboard to begin using Cloud+.)

The **Cloud+** command will allow you to create a cloud shape anywhere on the drawing/PDF along with a text box to add comments.
Grouping Shapes and Textbox

To create your own box and add a callout comment, utilize the line and text commands in the Markup toolbar. Once completed, select every line and text box and right click on top of the selected shapes, then select “Group.”

All markups made will become permanent record.

Select the “Group” option to turn all entries into one comment.

Markup tools to create your own shapes and callouts.
Adding Images

To add images to the document in review, select the “Markup” tab and click the “Image” button.

To add an image, click the Image icon.

Click “Open From Disk” to access your local PC files.
Select the image and click “Open”.

Your cursor will change to a target pointer, click and drag on the portion of the document where you would like to add the image.
To resize the image, click on it, and drag any of the yellow points to increase/decrease size.

To delete, right click on the image and select “Delete”.
Attaching Documents

To attach a document for reference, click the “Attachment” icon.

Select “Open From Disk” and locate your attachment.
Select the attachment and click “Open”

Attachments will show as a Paper Clip; click anywhere in the document to place the attachment. To open the attachment, double-click the paper clip.
Sorting by Name
To sort comments by Author, click the Author title column.

Click on the Author column title.

Comments will appear sorted by Author.
Applying Filters

To apply filters to all columns, click the Filter button.

Filter arrows will become enabled on each applicable column as shown below.

Click on the blue down-arrow in the “Author” column to select name, select from the list of available options.

Comments for selected name will be filtered as shown below.
Comparing documents in a Bluebeam Session

When reviewing documents, comparing two versions of the same document in the Bluebeam session is possible by opening both documents and splitting the window in two.

Documents in the Bluebeam session have the blue studio symbol (icon) on the left of the document name tab.

To split the window and view both documents at the same time select the Window menu and click on “Split Vertical”.

Select “Split Vertical” to divide the window and begin comparing the documents.
The split screen will display both documents as shown below.
Finalizing and Saving a Bluebeam Studio Session
Prior to finalizing a Bluebeam session, create a destination folder to save documents to, on your desktop (E.g., Bluebeam Review Finalized).

Once the Bluebeam session is complete and your comments included, you would want to “Finish” the session. Begin by closing all the session documents. Continue to follow the steps below to complete the process.

The “Finish Session” pop-up window will display.

Once all session documents have been closed, click the “Finish” button.

Select the “Save In Folder” path by clicking on ellipsis button.

Click and deselect the Report Option “Generate Report” (Report type is unnecessary).

Click OK; the session will be saved in folder selected. (Bluebeam session is now over)
Running Reports
To capture a PDF summary from all comments please follow the steps described below:

Click the Summary down-arrow
Select PDF Summary
Click OK
The PDF Summary will display as an additional document tab.

To save a copy to your local drive, right-click on the name tab and select “Save As”.
Click “Save to Disk”

Save to applicable folder
PM Closes Session
Manage Attendee Access

Add text

- Follow invitation instructions to invite Design Engineer: (x-ref)
- Designer conducts their response to comments.
After attendees are locked out, add designers using the same invitation method:

Attendee access shows allowance for Designers while MassDOT is locked out.
Measure Tools
The Measure tool creates measurements in any of several measurement modes. Measurements can persist as markups, allowing for processing and summarization through the Markups list, which is useful for estimation and takeoffs, or be temporary, which is useful for quickly measuring and adding up measurements without creating a visual record on the PDF.

When the Measure Tool is activated, the last measurement mode used is automatically selected. This makes it easier to employ your most commonly used measurement mode.

To enable accurate measurements, the user must first calibrate the page/drawing; then, proceed to use any of the measurement and calibrate tools available.
Calibrate

Select the Calibrate button to calibrate your drawing.

Click OK
Cursor will change to a four-line target, you will be able to drag between point A and B to calibrate length.

Confirm measurement by clicking OK.
This time the cursor will change to a four-line target with a ruler. Click and drag from (point A) to the length you’d like to measure (point B).

Measurement will appear in red double headed arrows as shown.