DFD BLUEBEAM USER GUIDE
V4.1
(Revu 20)
(Note: These are temporary instructions until the implementation of eBuilder)

Table of Contents

Training videos are available at https://support.bluebeam.com/training-videos/

General Instructions

Google Chrome is the recommended browser to use. This user guide is developed using Chrome and you may experience a different process if other browsers are used.
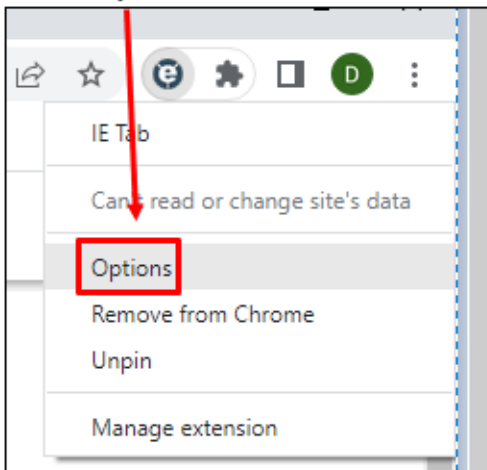
One-Time removal of Internet Explorer (IE) Extension

The IE extension for SharePoint (https://doa.dfdmdocs.wisconsin.gov/Pages/Home.aspx) will need to be removed if it is currently installed on your computer. To check if you have URL added and to remove it:

1. Open Google Chrome.

2. Right-click on the **IE Tab Extension Icon** on the top left toolbar.
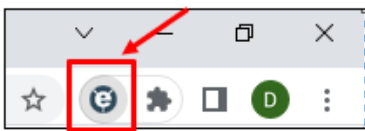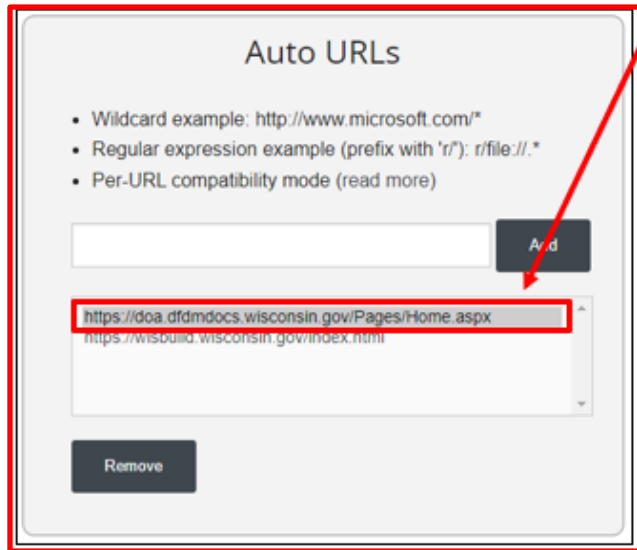
3. Click on **Options**.

Questions/Help?
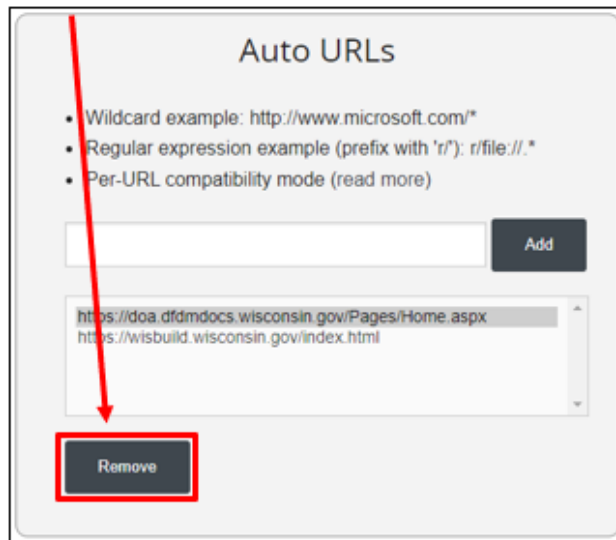denise.hawley1@wisconsin.gov or
matthew.dapp1@wisconsin.gov   2   10/3/23

4. Scroll down to Auto URLs Box.
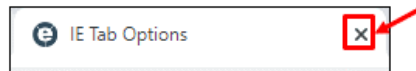   a. Click the URL **https://doa.dfdmdocs.wisconsin.gov/Pages/Home.aspx**.

   b. Click **Remove**.

   c. You can now close the Tab by selecting the **X**.

Questions/Help?
denise.hawley1@wisconsin.gov or
matthew.dapp1@wisconsin.gov   3   10/3/23
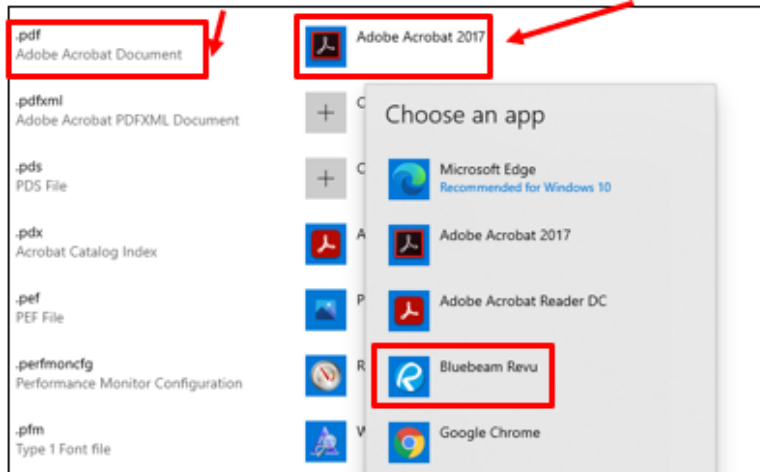
One-Time BLUEBEAM Setup Items

<u>BLUEBEAM DEFAULT</u>

Make sure Bluebeam is set as the default pdf reader.

1. Click **Start** on your computer.

2. Go to **Settings** > **Apps** > **Default apps**.
3. Scroll down to **Choose default apps by file type**
4. Scroll down to **.pdf** and click the application that is the present default.

5. Select **Bluebeam Revu** and then **X** after the change to close the window.
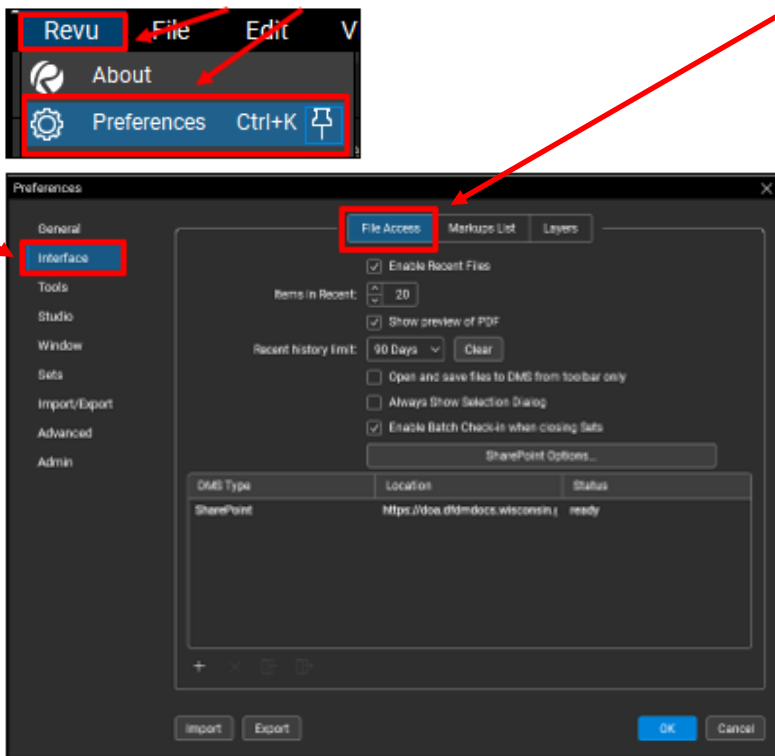   *Zip files will not open in Bluebeam.

Questions/Help?
denise.hawley1@wisconsin.gov or
matthew.dapp1@wisconsin.gov   4   10/3/23

REMOVE SHAREPOINT INTERFACE FROM BLUEBEAM DMS

You will want to confirm that you have removed SharePoint as an interface to Bluebeam.

1. In Bluebeam, go to **Revu** > **Preferences** > **Interface** > and select **File Access**.

Note: If you do not see a DMS Type of SharePoint listed with the location of https://doa.dfdmdocs.wisconsin.gov/, you will not need to complete the remain steps in this process.

2. Click on the DMS Type listed.
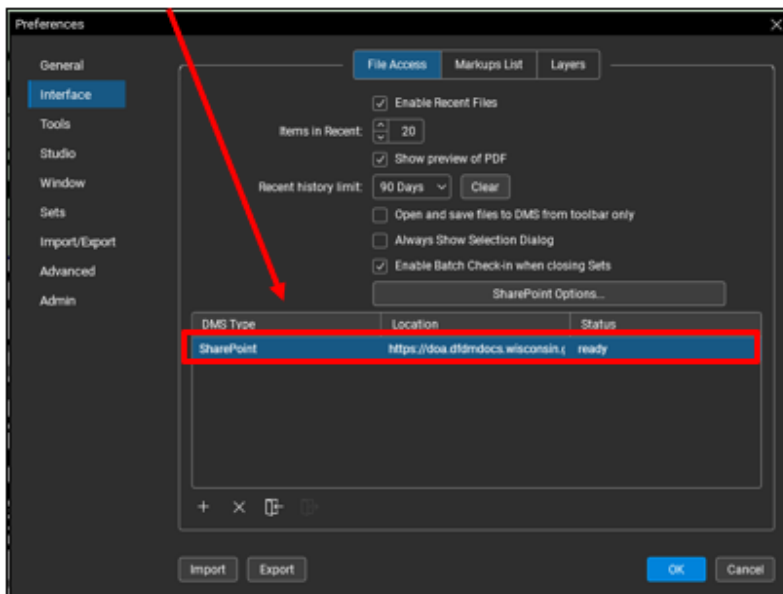
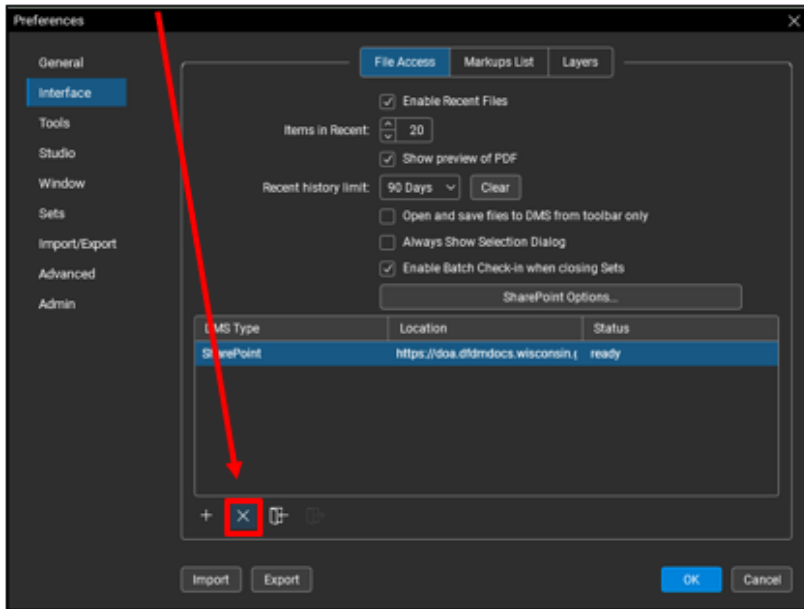Questions/Help?
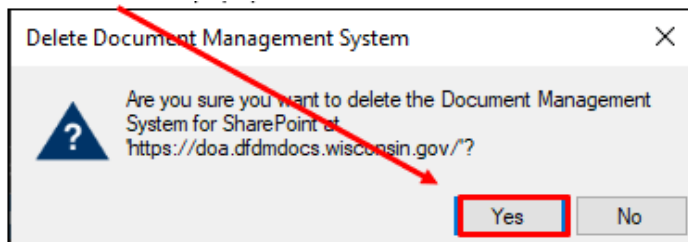denise.hawley1@wisconsin.gov or
matthew.dapp1@wisconsin.gov   5   10/3/23

3. Click on the **X**.

4. Select **Yes** in the popup window.

5. Click **OK**.

Questions/Help?
denise.hawley1@wisconsin.gov or
matthew.dapp1@wisconsin.gov   6   10/3/23
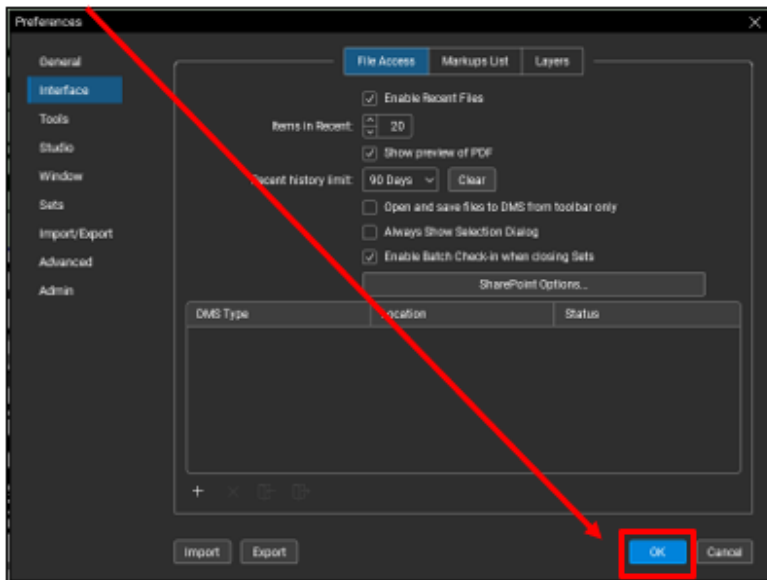
CHANGING COMMENT AUTHOR USERNAME

You will want to change your username to how it should appear in the markup window.

1. In Bluebeam, go to **Revu** > **Preferences** > **General** > **Options**
2. In the User field, change your name and include DFD. Ex. Matt Dapp - DFD

3. Click **OK**.
4. Go to: https://studio.bluebeam.com/Default.aspx
5. Create an account if you do not already have one.
6. Go to **My Profile** > **User Data** and change Default Name to match what you entered in Step 2 above. Ex. Matt Dapp - DFD
7. Click **Update profile**.
8. You may need to close Bluebeam and re-open for the change to occur. The username will not change on an active session you are participating in; however, it will update for future sessions.

Questions/Help?
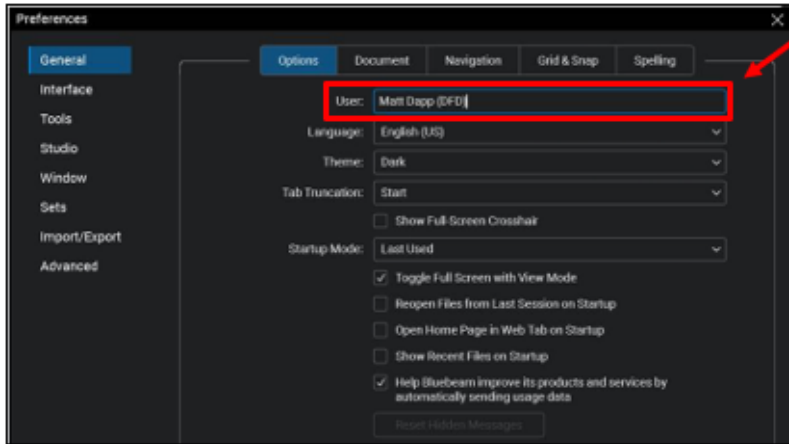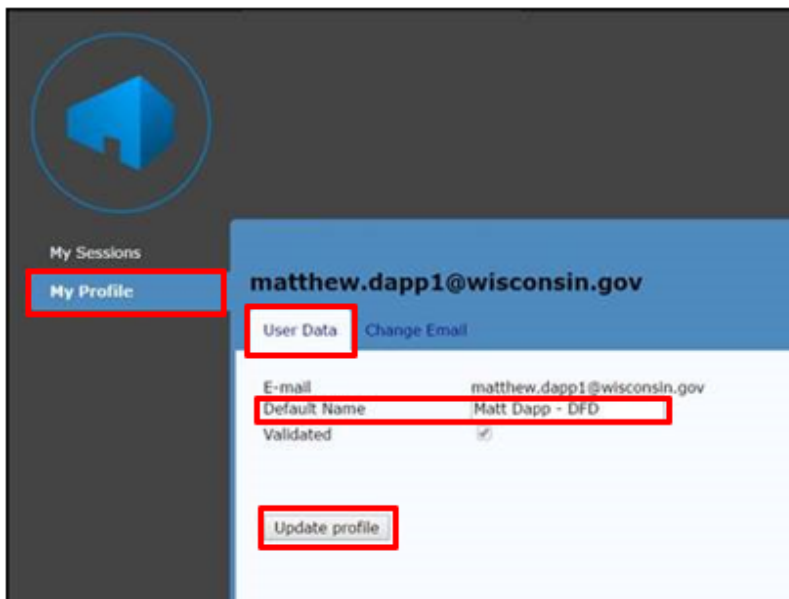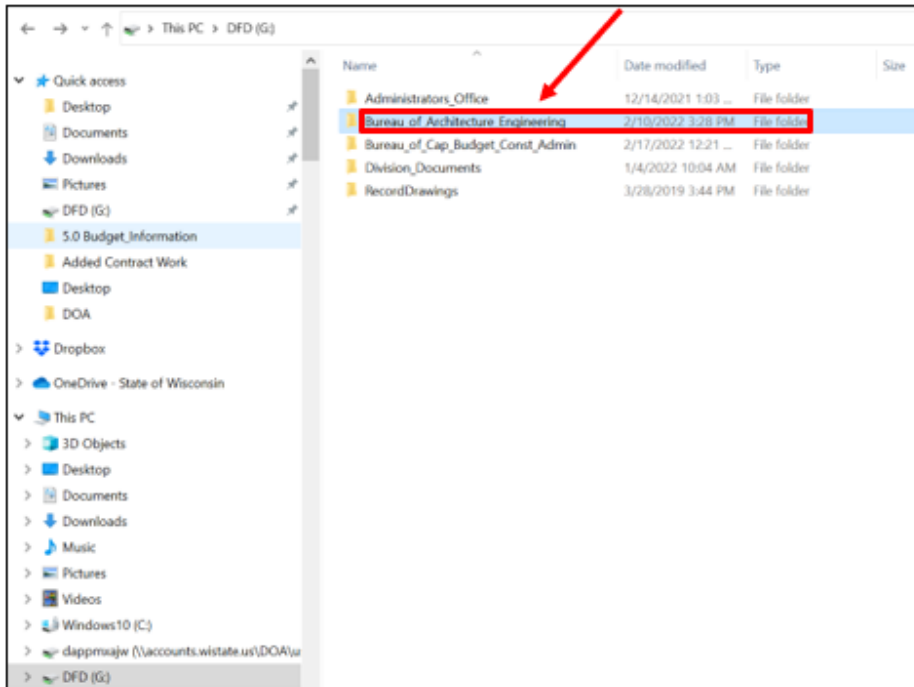denise.hawley1@wisconsin.gov or
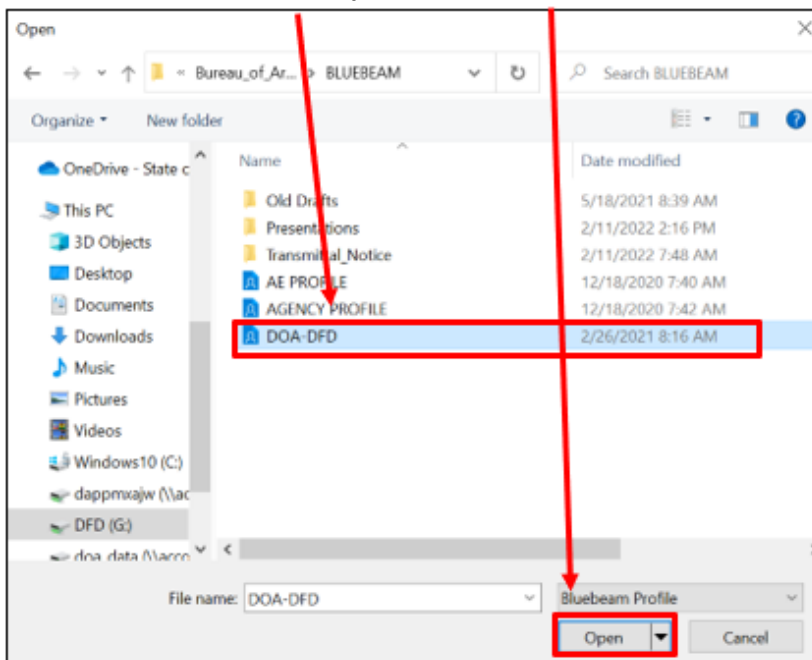matthew.dapp1@wisconsin.gov   7   10/3/23

IMPORTING PROFILES AND TOOL SETS

To Import a Profile:

1. Open Bluebeam.
2. Go to **Revu** > **Profiles** > **Manage Profiles**.
3. Click **Import**.
4. Navigate to the **G: drive** > **Bureau of Architecture Engineering** folder.

5. Open the **BLUEBEAM** folder.
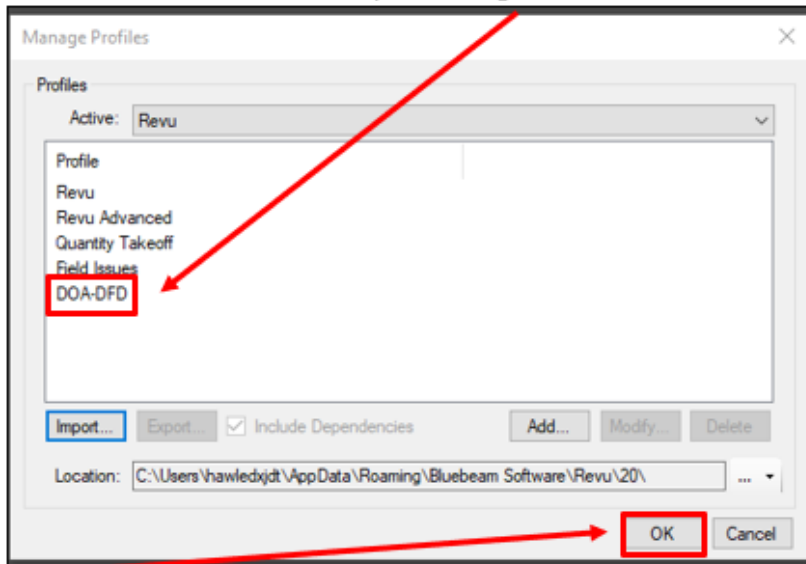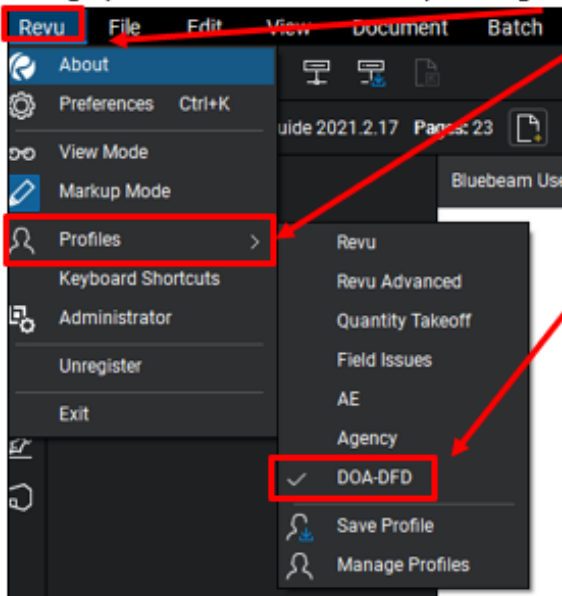6. Click on **DOA-DFD** and click **Open**.

Questions/Help?
denise.hawley1@wisconsin.gov or
matthew.dapp1@wisconsin.gov

10/3/23

7. You will see DOA-DFD added to your Managed Profiles.

8. Click **OK**.
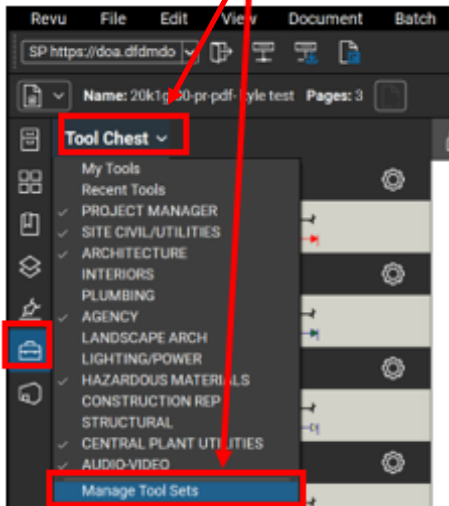9. Change your Profile to DOA-DFD by clicking **Revu** > **Profiles** > **DOA-DFD.**

Questions/Help?
denise.hawley1@wisconsin.gov or
matthew.dapp1@wisconsin.gov   9   10/3/23

To Import a Tool Set:

1. In Bluebeam, click the **Tool Chest** icon.
2. Click the **down arrow** next to Tool Chest.
3. Click **Manage Tool Sets**.

4. Click **Import**
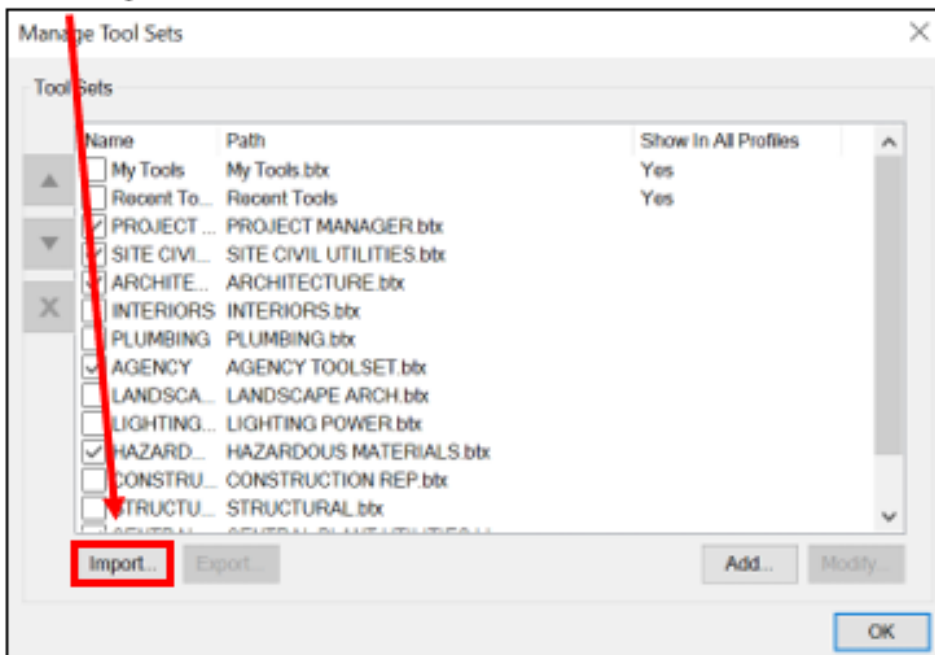
5. Navigate to the **G: drive** > **Bureau of Architecture Engineering** folder.
6. Open the **BLUEBEAM** folder.

Questions/Help?
denise.hawley1@wisconsin.gov or
matthew.dapp1@wisconsin.gov   10   10/3/23

7. Double-click on one of the **Toolsets** that would apply to the types of reviews that may be performed by the user.
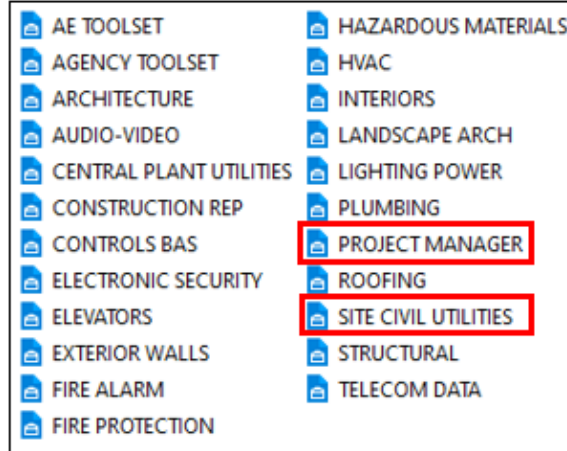
> Example: A person managing projects and performing civil reviews will import the **Project Manager** and **Site Civil/Utilities** Toolsets. Similarly, someone managing projects and performing plumbing and fire protections reviews, will import the Project Manager, Plumbing and Fire Protection Toolsets.

Note: You will need to upload each tool set separately.

AE TOOLSET	HAZARDOUS MATERIALS
AGENCY TOOLSET	HVAC
ARCHITECTURE	INTERIORS
AUDIO-VIDEO	LANDSCAPE ARCH
CENTRAL PLANT UTILITIES	LIGHTING POWER
CONSTRUCTION REP	PLUMBING
CONTROLS BAS	PROJECT MANAGER
ELECTRONIC SECURITY	ROOFING
ELEVATORS	SITE CIVIL UTILITIES
EXTERIOR WALLS	STRUCTURAL
FIRE ALARM	TELECOM DATA
FIRE PROTECTION	

8. If you need to add more than one Toolset, click **Import** again.
9. Once you have added in all the Toolsets you need, click **OK**.
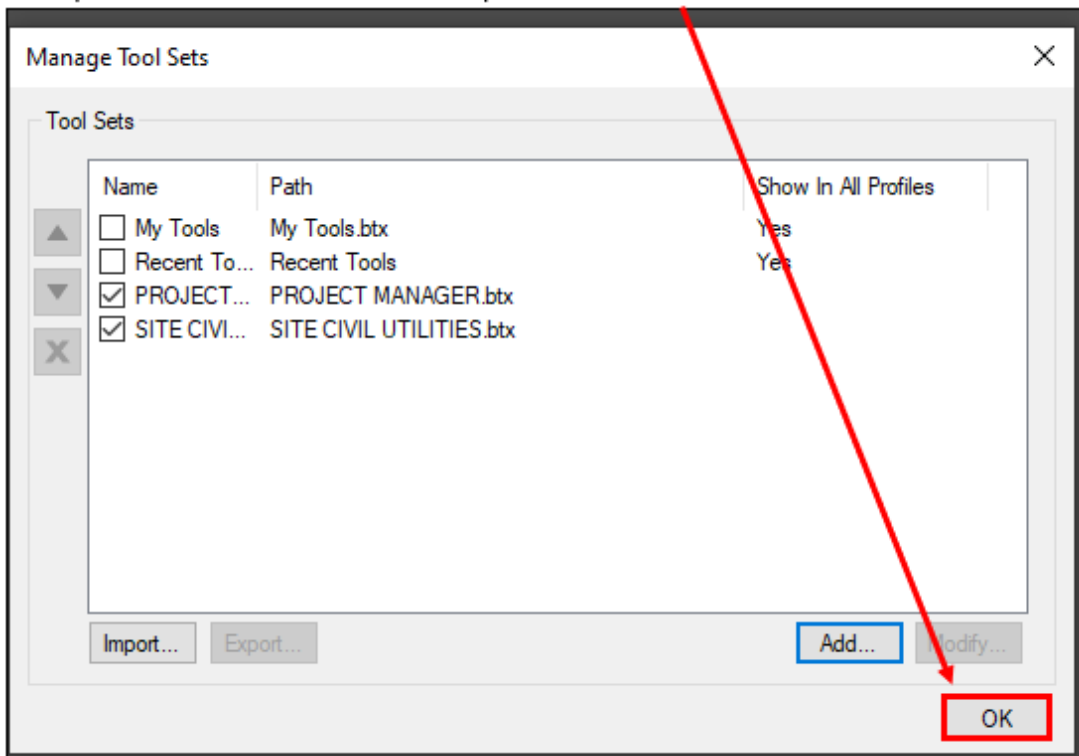
Questions/Help?
denise.hawley1@wisconsin.gov or
matthew.dapp1@wisconsin.gov   11   10/3/23

Working with Sessions

<u>CREATING A BLUEBEAM SESSION ACCOUNT</u> (one-time requirement)

1. Login and click on **Revu**, then **Preferences.**
2. Select **Studio.**
3. Click the **Servers** tab.
4. Click **+ Add**. The Create New Server box appears.
5. Confirm **studio.bluebeam.com** in the Address field.
6. Click **OK**.
7. Press **ALT +C** to access the Studio panel.
8. Go to **Studio** > **Sign In**.
9. Click on **Create New Account**.
10. Enter DOA email and create a password. **Remember your password since it will be unique to Bluebeam.**
11. Agree to the terms and click **Create Account**. (You will receive an email verification with instructions.)

<u>USING SESSIONS IN BLUEBEAM</u>
Steps 1 thru 38 are for setting up a review
Steps 39 thru 48 contains general guidance for actions taken during a review
Steps 49 thru 66 are for finishing a review session

Setting up a Review:

1. Navigate to your project folder in **G:\Division_Documents\All_Projects_by_Agency**. You may need to set up your project folder if you haven't already done so at the start of your project.
   Note: Please contact your Team Lead if you need guidance on setting up project folder.
2. Select the **Design** folder under your project folder.
3. Create a new folder called **PR Review** or **FR Review,** within the Design folder, depending on the type of review being set up. Create a **Pre-Design Review** folder within the Pre-Design folder. **PR Review** is used in this example.
4. Navigate to your project folder in SharePoint <u>using Chrome as your browser without IE Extension as shown on page 2.</u>
5. Next Check Out each document by selecting the box next to each document. A blue arrow will appear.
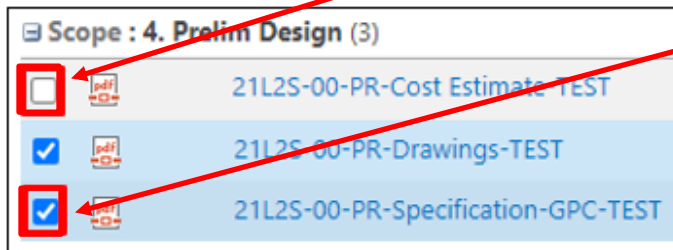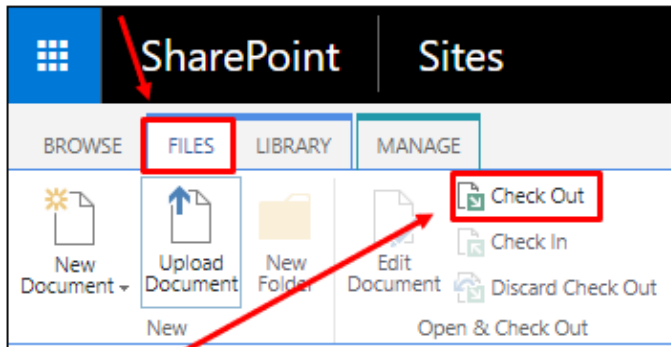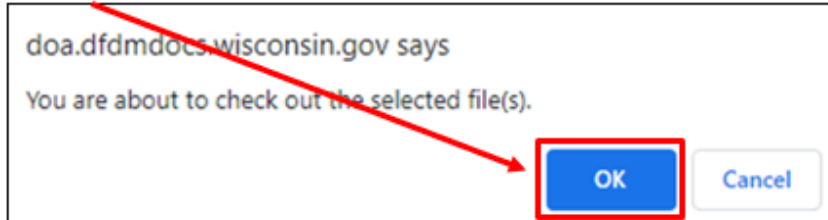
Questions/Help?
denise.hawley1@wisconsin.gov or
matthew.dapp1@wisconsin.gov   12   10/3/23

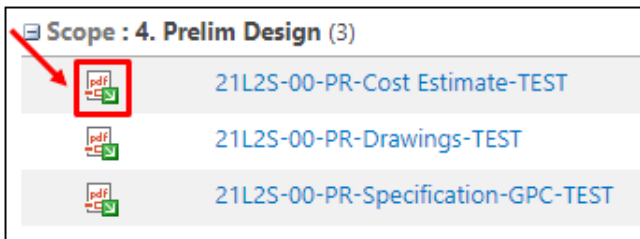6. Click on **FILES** on the top left of your screen.
   Note: If your monitor is a smaller size or your browser screen is minimized, you may need to hover over the Open & Check Out area if you do not see the Check Out text.

7. Click **Check Out**.
8. Click **OK** in the popup window.

9. You will now see a green arrow indicating your documents are now checked out.

10. Hover over the document you want to open until you get the down arrow to appear.

11. Click on the arrow and select **Download a Copy** from the dropdown (Do not click on the document link).

Questions/Help?
denise.hawley1@wisconsin.gov or
matthew.dapp1@wisconsin.gov   13   10/3/23

12. Do this for all files that are going to be incorporated into the electronic review (drawings, specifications, estimate, DR summary, DR appendix, Pre-Design Report, etc.). You will see all documents appear on the bottom of the screen.
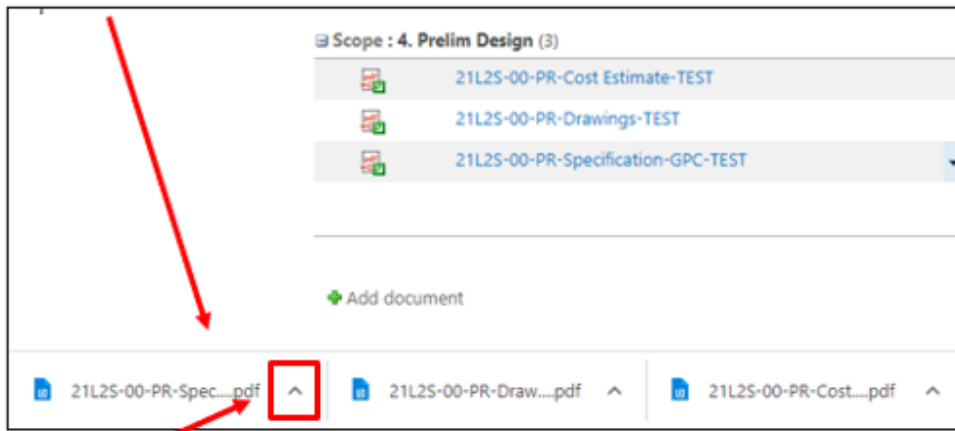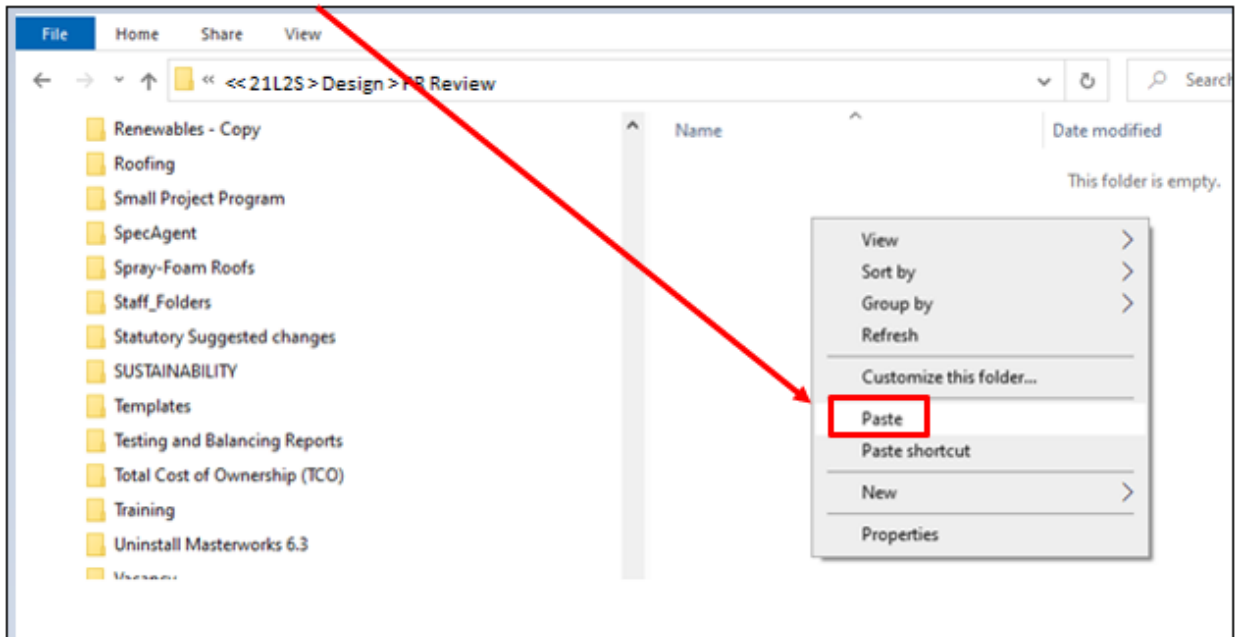

13. Click the up arrow next to one of the documents.
14. Select **Show in folder.**
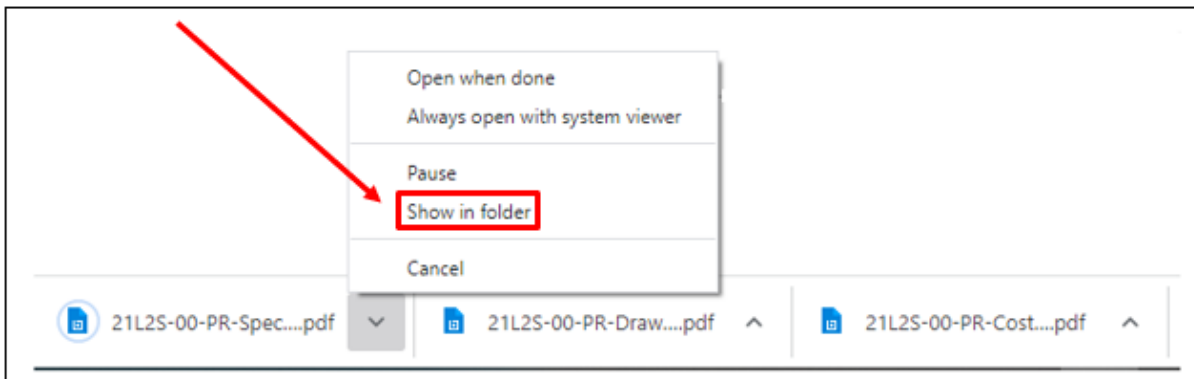
15. Select the first document you want to copy, then hold the Shift and select the last document you want to copy. All documents in between should be highlighted.
16. **Right click** on the documents and select **Cut**.

Questions/Help?
denise.hawley1@wisconsin.gov or
matthew.dapp1@wisconsin.gov   14   10/3/23
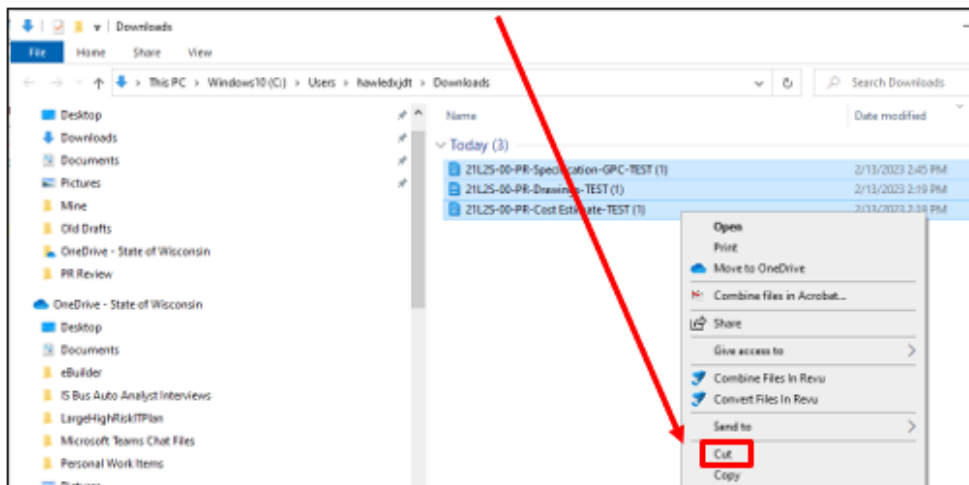
17. Navigate to the **PR Review** folder, you just created, under your project.
18. Right click and select **Paste**.

19. The document(s) should successfully copy to your **PR Review** folder.
20. To open document(s) in Bluebeam Revu 20, select the first document you want to copy, then hold the Shift and select the last document you want to copy. All documents in between should be highlighted.
    a) OR CTRL + Left Click on each.
21. Right click on highlighted documents and click **Open.**
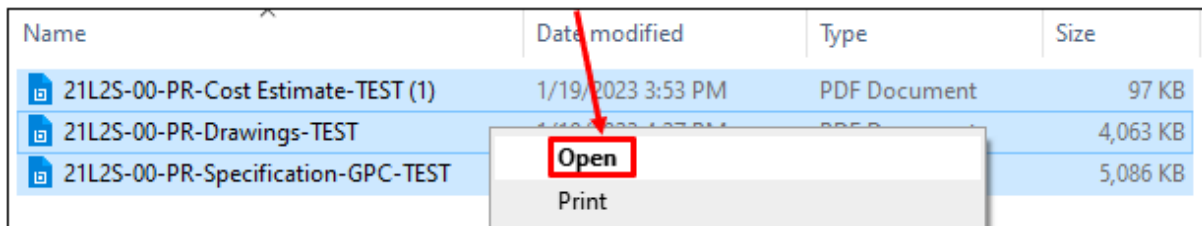
22. All documents will open in Bluebeam Revu 20.
23. Confirm you are in Mark Up Mode by going to **Revu > Markup Mode.**

Questions/Help?
denise.hawley1@wisconsin.gov or
matthew.dapp1@wisconsin.gov   15   10/3/23
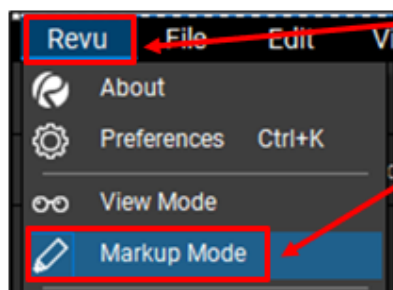
24. **IMPORTANT**: Confirm drawings and specs comply with latest DFD drawing and specification requirements as noted in the *DFD Bluebeam Review workflow (AE)* that can be found here: https://doa.wi.gov/Pages/Bluebeam-Technical-Review.aspx. (Sheets are flattened, bookmarks are included, etc.).
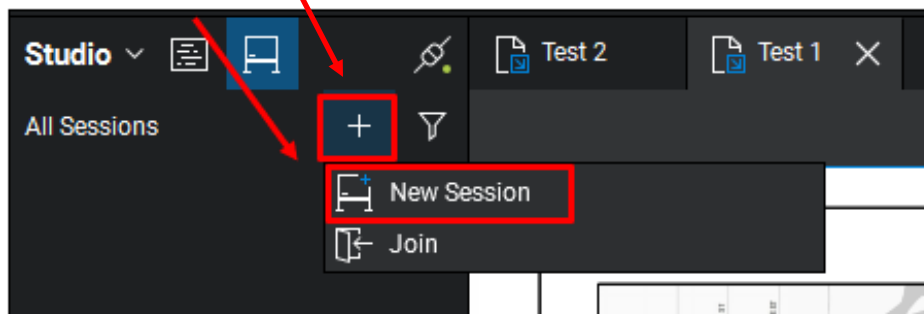   Note: If documents do not meet these requirements, notify the AE team to make updates prior to setting up review session. **Do not** proceed to next step. Documents will need to be checked in and replaced on SharePoint. Then follow steps starting at Step 5 again.
25. Sign into **Studio** and click the **Session** button.
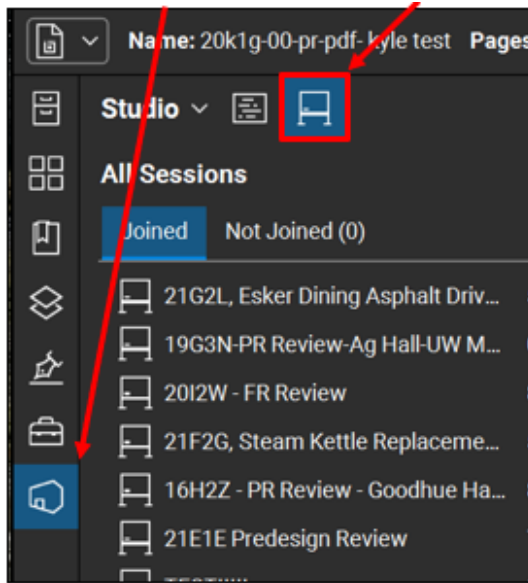
26. Click the **+** to add a new session.
27. Then click **New Session**.

Questions/Help?
denise.hawley1@wisconsin.gov or
matthew.dapp1@wisconsin.gov   16   10/3/23

28. Give the session a name, which should include the Project #, Type of Review, Project Name/Location, Agency/Institution. (i.e., 21L2S, PR Review, Goodhue Hall, UW-Whitewater)
   Note: Session name is limited to 60 characters. You may have to abbreviate but still be descriptive.
29. Click **Add Open Files.**

Questions/Help?
denise.hawley1@wisconsin.gov or
matthew.dapp1@wisconsin.gov   17   10/3/23
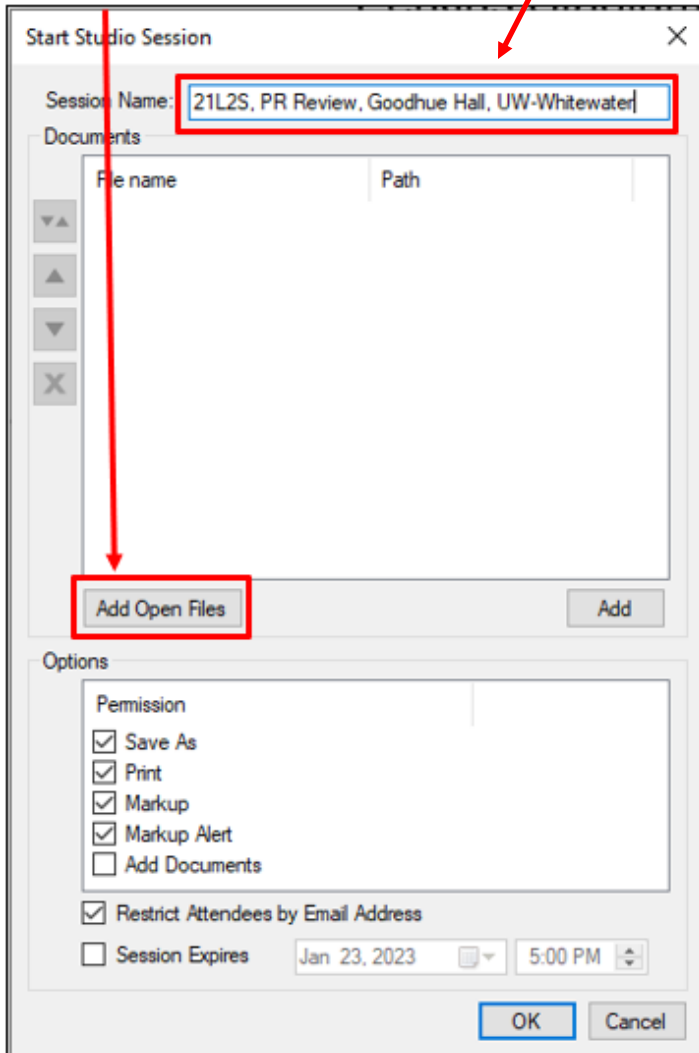
30. The files will be added to your Bluebeam review session.
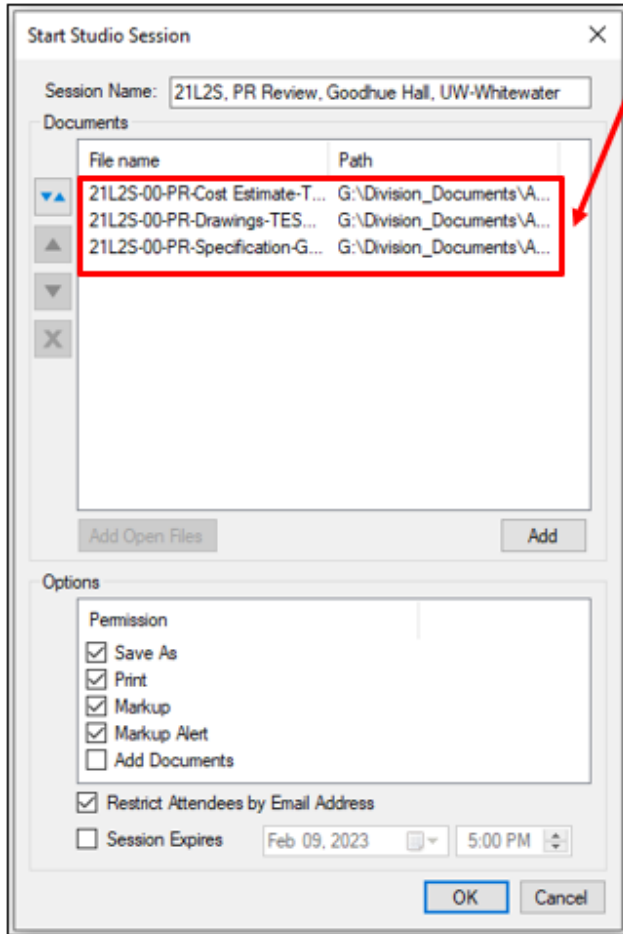
Questions/Help?
denise.hawley1@wisconsin.gov or
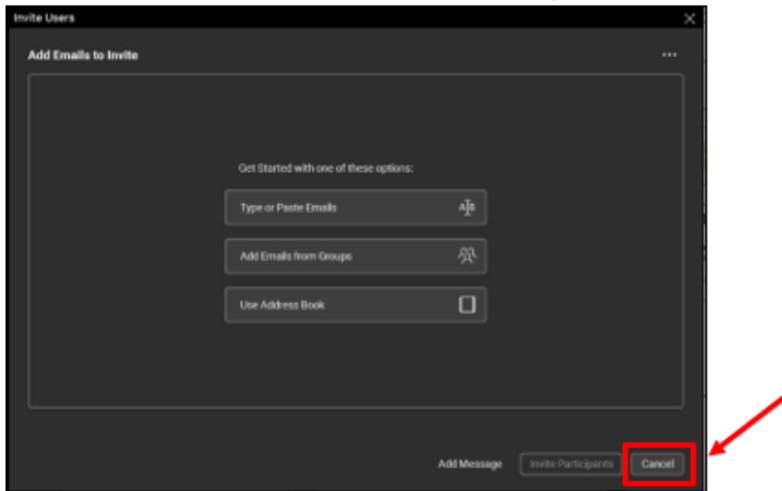matthew.dapp1@wisconsin.gov   18   10/3/23

31. Check the **Add Documents** box to allow attendees to add documents to the session. This may be needed if the AE team decides to add a missing or revised sheet once the review has started.
32. Uncheck **Restrict Attendees by Email Address**. If the box is checked, you must enter the email address of everyone you want to participate in the review. This is not preferred.
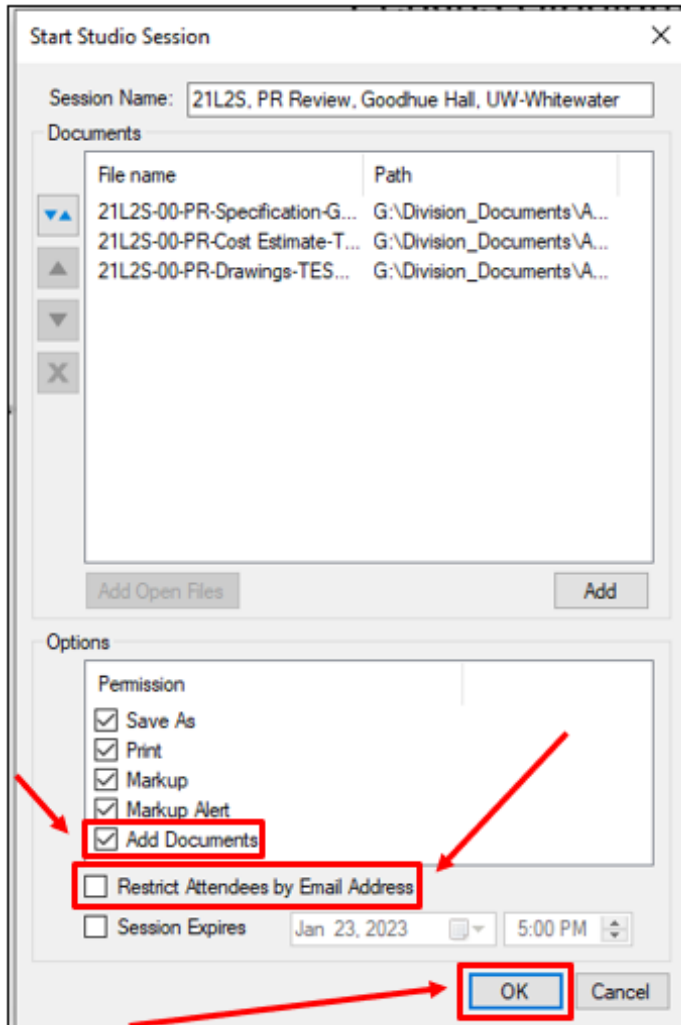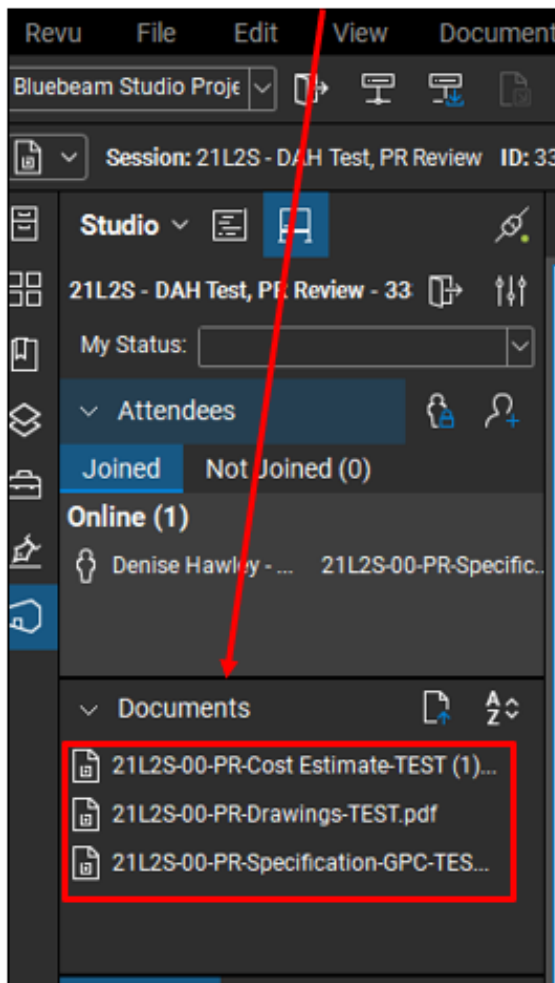

33. Click **OK**, and a pop-up box to Invite Users will appear.

Questions/Help?
denise.hawley1@wisconsin.gov or
matthew.dapp1@wisconsin.gov   19   10/3/23

34. Click **Cancel.** Attendees will be invited later in the process.

35. Open each of the documents associated with the review session. These are located on the left side of the screen under **Documents**.
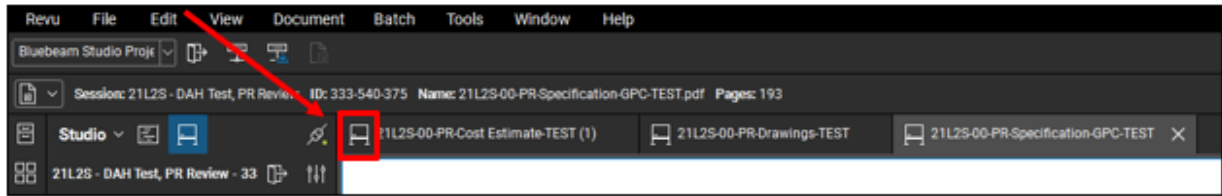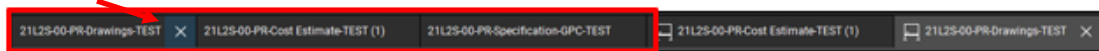
Questions/Help?
denise.hawley1@wisconsin.gov or
matthew.dapp1@wisconsin.gov   20   10/3/23

36. New documents that were created as part of the Bluebeam review will appear at the top of the screen (**marker board** symbol identification).

37. Close the previously open documents that **do not** have the marker board symbol, by hovering over them or selecting the tab and click on the **X**.


38. To copy the review session information to send to others, make sure you are in your review session and click the **person icon**.
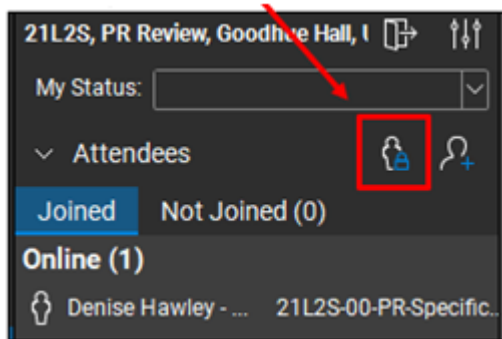
39. The following screen opens, and you can then click **Copy Invitation**. The information can then be pasted into an email or Outlook invite.
Note: The process for setting up and sending out a Bluebeam review session is in the DFD Transmittal Notice for Reviews Process located here:
G:\Bureau_of_Architecture_Engineering\BLUEBEAM\Transmittal_Notice.
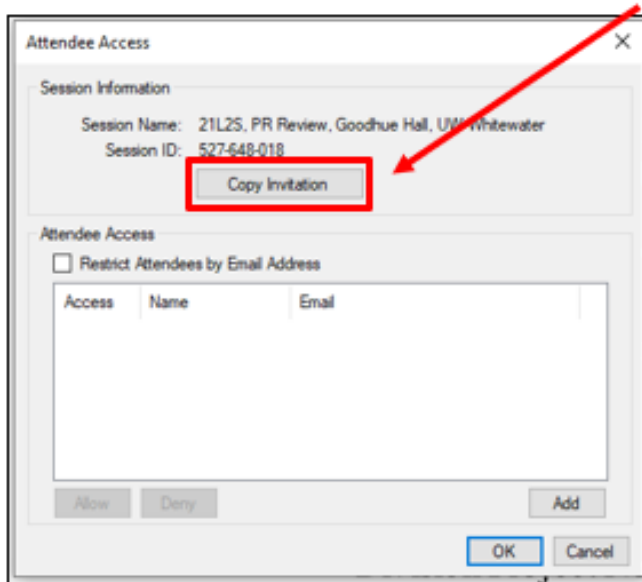
Note: This is the end of setting up a review session.
Questions/Help?
denise.hawley1@wisconsin.gov or
matthew.dapp1@wisconsin.gov   21   10/3/23

General guidance for actions taken during a review:

Note: Overall process for completing an electronic review using Bluebeam is provided in the Bluebeam DFD PM Review Workflow located here: https://doa.wi.gov/Pages/Bluebeam-Technical-Review.aspx.

40. Comments shall be made to the documents using one of the 6 tools in the designated tool set for each discipline. A DFD Project Manager shall use the PROJECT MANAGER tools when commenting; a person doing the roofing review shall use the ROOFING tool set; a person doing the plumbing review should use the PLUMBING tool set, etc.
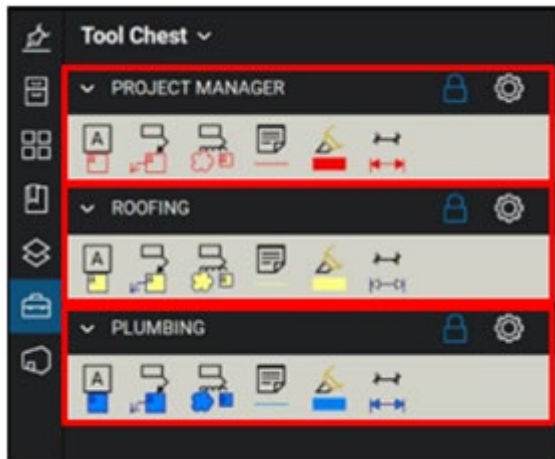
41. Each tool has a set of properties that also show up in the Markups List at the bottom of the screen. As an example, a comment made by the DFD Project Manager will show up with a Subject as PROJECT MANAGER. The A/E team's responses will be nested with each comment. The columns can be sorted or filtered to view comments by a specific discipline, page, author, etc.
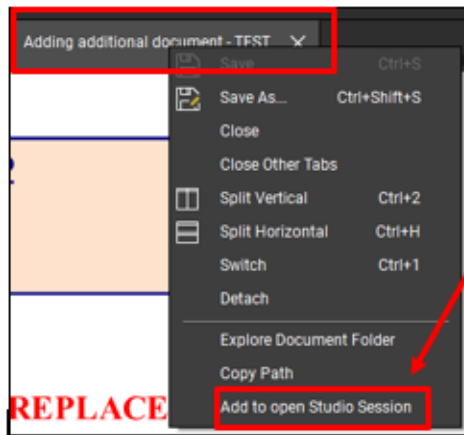
Questions/Help?
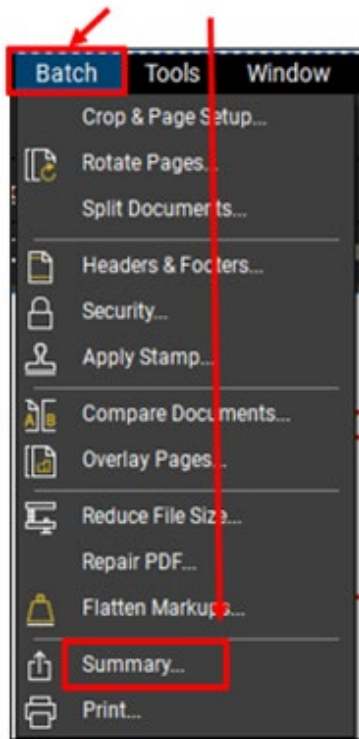denise.hawley1@wisconsin.gov or
matthew.dapp1@wisconsin.gov   22   10/3/23

42. At any time during the session missing/revised documents can be added by the DFD PM.
    a) Go to Setting Up Review in this document. Follow steps 4-21.
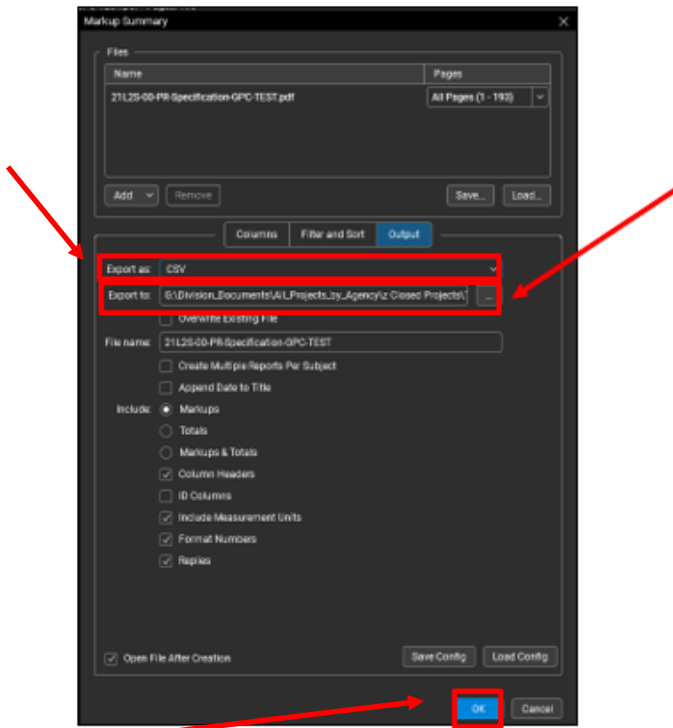   b) Right click document and select **Add to open Studio Session.**

43. At any time during the session, you can generate and save a report that contains a list of all comments.
   a) Click **Batch** > **Summary**.

Questions/Help?
denise.hawley1@wisconsin.gov or
matthew.dapp1@wisconsin.gov   23   10/3/23

b) Select **CSV** in the **Export As** field.

c) Select a location to save the report to.

d) Click **OK** to create the report.

44. Click the **Leave Session** button next to the session name to leave a session and return later. This does not finish or close the session; it allows you to enter a different session.
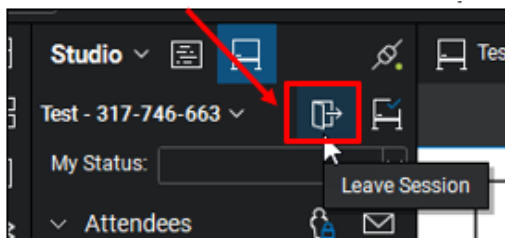
45. When Technical Reviewers are finished reviewing each of the documents in the session, they will let the DFD PM and A/E team know they are finished by changing their status to "Finished."

   o Go to **My Status** and click the down arrow.

   o Select **Finished**.
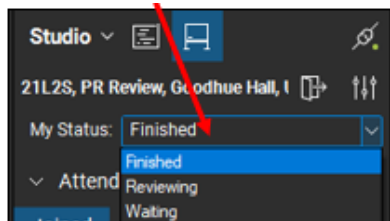
Questions/Help?
denise.hawley1@wisconsin.gov or
matthew.dapp1@wisconsin.gov   24   10/3/23

Finishing a Session:

46. After all comments have been responded to by the A/E, the review session can be completed.
47. You must complete the session by clicking on the **session name** and clicking **Finish Session.**
    This makes the Session link inactive and does not allow comments or responses to be added to the files.
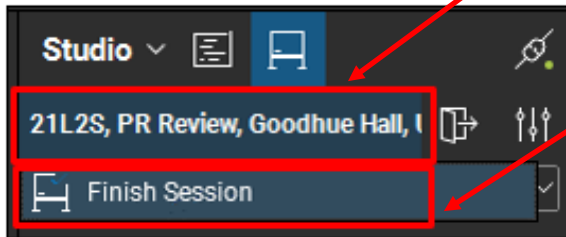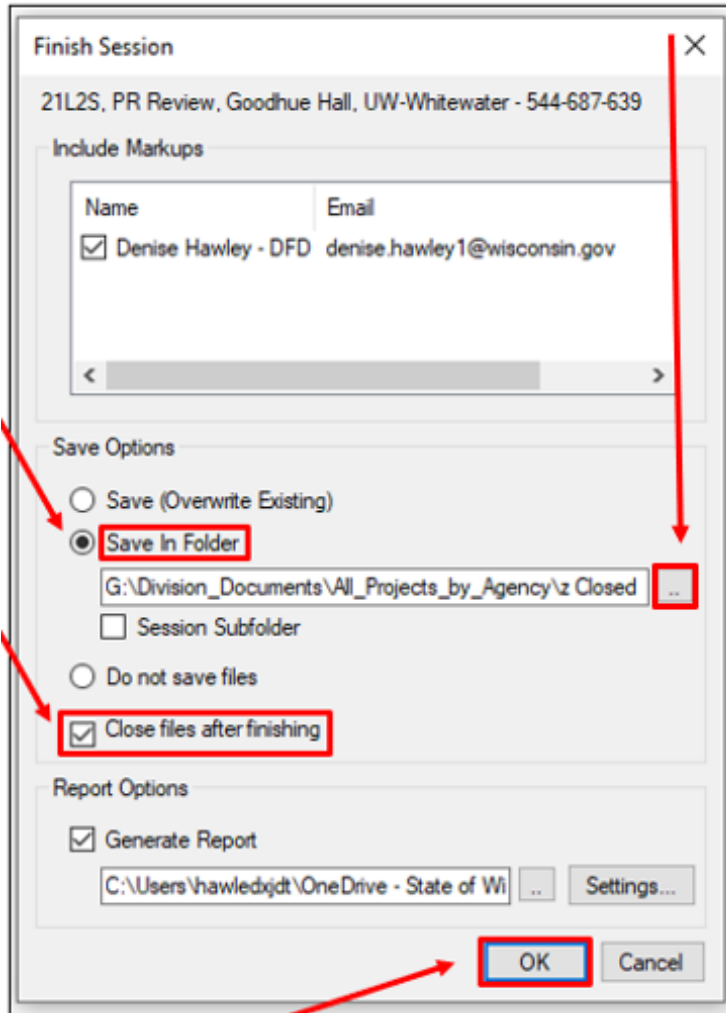
Questions/Help?
denise.hawley1@wisconsin.gov or
matthew.dapp1@wisconsin.gov   25   10/3/23

48. Confirm **Save In Folder** is selected.
    a)   Click the box with the ellipses and navigate to your project folder in
         G:\Division_Documents\All_Projects_by_Agency.
   b)   Check the **Close files after finishing** checkbox

    c)   If you would like to generate a report (optional), navigate to the folder where you want the
         report saved by clicking the box with the ellipses.
   d)   Click **OK**. (Uncheck the box if you do not want a report generated.)

Questions/Help?
denise.hawley1@wisconsin.gov or
matthew.dapp1@wisconsin.gov   26   10/3/23

49. Once documents have been saved to the project folder, you will receive a completed message.
50. Click **OK**.
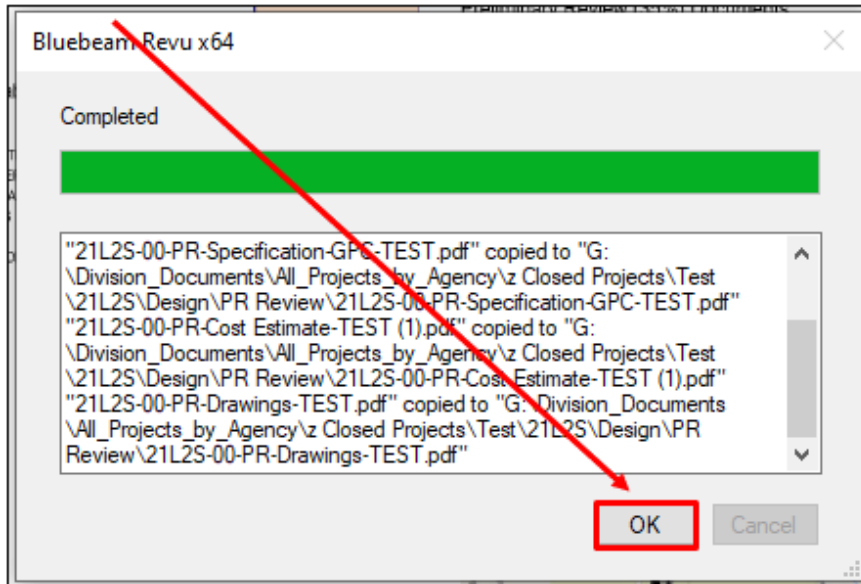
51. Go to SharePoint (https://doa.dfdmdocs.wisconsin.gov/) and select your project folder.

52. Go to File Explorer and navigate to your project folder under **G:\Division_Documents\All_Projects_by_Agency**.

53. Place the window with **File Explorer** next to **SharePoint**.
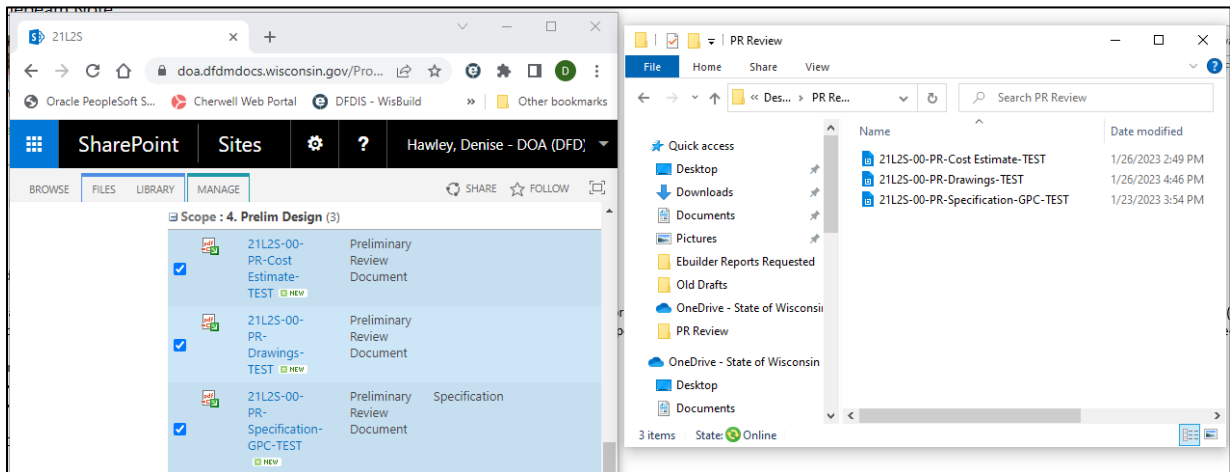
54. In File Explorer, select the first document you want to copy, then hold the Shift and select the last document you want to copy. All documents in between should be highlighted.

Questions/Help?
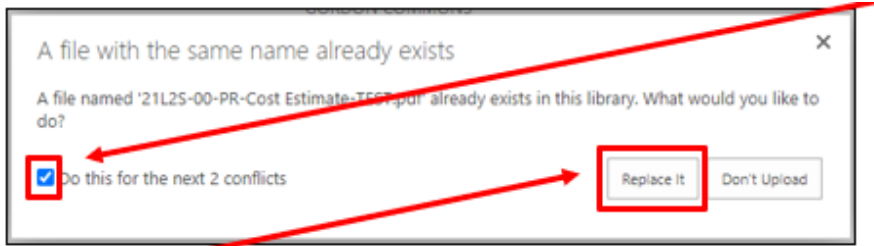denise.hawley1@wisconsin.gov or
matthew.dapp1@wisconsin.gov   27   10/3/23

55. Drag those documents over to your project folder in SharePoint.

56. You will receive a message saying "A file with the same name already exists". **Click the checkbox** to "Do this for the next # of conflicts".
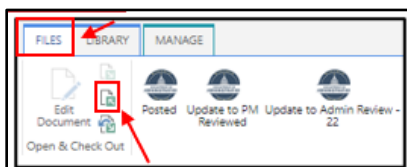

57. Click **Replace It**.
58. Confirm the newest version of your document has saved.
59. Click the check boxes next to the documents you uploaded that are checked out.

60. Click **Files.**

61. Click **Check In**.
62. Another box will pop up.

Questions/Help?
denise.hawley1@wisconsin.gov or
matthew.dapp1@wisconsin.gov   28   10/3/23

63. Leave minor version selected
64. Update "Retain your checkout after checking in?" to **Yes**.

65. Click **Ok**.

This completes the review. Files on SharePoint should contain comments and responses. <u>They are to remain checked out</u>. This will prevent someone else from inadvertently overriding or deleting the files.

Questions/Help?
denise.hawley1@wisconsin.gov or
matthew.dapp1@wisconsin.gov   29   10/3/23

CLOSING A REVIEW STARTED IN REVU 18

1. Remove IE Extension by following steps on pages 2 and 3.
2. Create new folder by following steps 1-3 under setting up a review on page 12.
3. Finish a session by following steps on page 25-28.

AVAILABLE OPTION TO OPEN DOCUMENTS ON SHAREPOINT

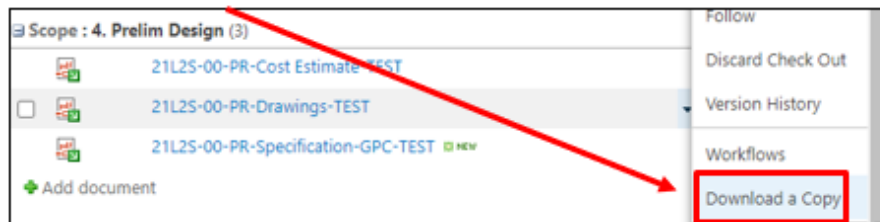1. View in Browser
   a) Hover over document until you get the down arrow to appear. Click the arrow, then click **View in Browser**.
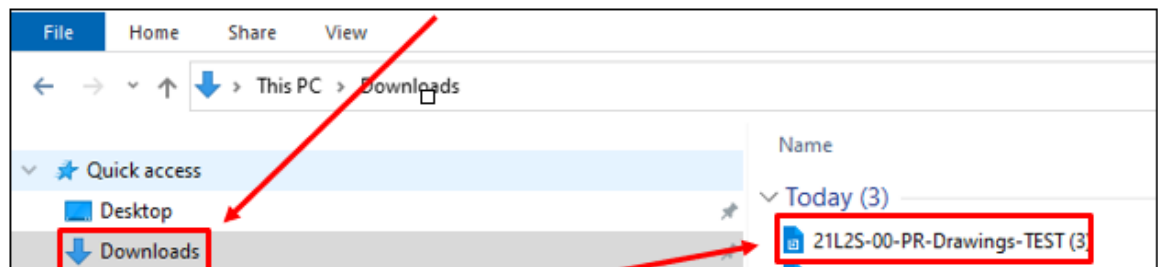

2. Download a copy
   a) Hover over document until you get the down arrow to appear. Click the arrow, then click **Download a Copy**.

   b) Go to File Explorer and select **Downloads**.

   c) **Double click** the document to open in Bluebeam.

Questions/Help?
denise.hawley1@wisconsin.gov or
matthew.dapp1@wisconsin.gov   30   10/3/23

ADDITIONAL INFORMATION

Note: Users can reactivate a Session within 120 days of closing it, if needed.
To reactivate a review session:
- Go to https://studio.bluebeam.com/Default.aspx
- Login
- From My Sessions, click the Session you want to reactivate
- In the Profile tab, click the Status dropdown and select Active
- Click Update
- Open Bluebeam and login to Studio and you should now see that session

Note: If a DFD PM opens a document that is currently checked out, they will need to remember to hit the "X" in the upper right hand corner of the document to close it. Do NOT click "Check In".

ADDITIONAL INFORMATION ON SESSIONS
- 500 attendees per session
- 5k files can be uploaded at 1 GB each
- Markups can be 10 MB each
- Studio sessions remain on Bluebeam servers for 120 days after they are finished
- Be patient for files to load, it can take some time depending on size; disconnecting from VPN also helps speed up the process
- The Record List documents every action done by each member in the order it was done; click to jump to that action.
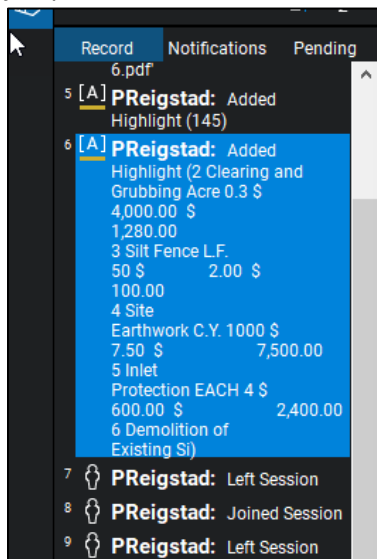
- When you place a markup, you can alert an attendee by right clicking on the markup and select **Attendee**; use the chat box to comment or ask questions.
- Click the filter list to select which items you want to see.
- You can also see what an attendee is doing as they are doing it by selecting them under the **Attendee** list and click **Follow Attendee.**

Questions/Help?
denise.hawley1@wisconsin.gov or
matthew.dapp1@wisconsin.gov   31   10/3/23