DFD BLUEBEAM USER GUIDE

V4.1

(Revu 20)

(Note: These are temporary instructions until the implementation of eBuilder)

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

General Instructions

<u>Google Chrome is the recommended browser to use.</u> 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 (<u>https://doa.dfdmdocs.wisconsin.gov/Pages/Home.aspx</u>) 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**.



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

• \	Wildcard example: http://www.microsoft.com/*
	Regular expression example (prefix with 'r/'): r/file://.* Per-URL compatibility mode (read more)
	A
	ttps://doa.dfdmdocs.wisconsin.gov/Pages/Home.aspx ttps://wisbuild.wisconsin.gov/index.ntmi
	Remove

b. Click **Remove**.

Auto URLs	
 Wildcard example: http://www.microsoft.com/* Regular expression example (prefix with 'r/'): r/file://. Per-URL compatibility mode (read more) 	
	Add
https://doa.dfdmdocs.wisconsin.gov/Pages/Home.aspx https://wisbuild.wisconsin.gov/index.html	* *
Remove	

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

Θ	IE Tab Options	×
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One-Time BLUEBEAM Setup Items

BLUEBEAM DEFAULT

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.

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**.

Revu Fil	e Edit V		
R About			
O Preference	ces Ctrl+K 꾸		
Preferences			>
General r	[File Access Markups List Lay	
Interface		Enable Recent Files	
Tools	Rems in Recent;	C 20	
Studio		Show preview of PDF	
Window	Recent history limit:	90 Days 🗸 Clear	
Sets		Open and save files to DMS from	too bar only
Import/Export		Always Show Selection Dialog	
Advanced		 Enable Batch Chack-in when close SharePoint Opi 	
Admin	OMS Type	Location	Status
	SharePoint	https://doe.dldmdocs.wisconsing	
l			
[Import Export		OK Cancel

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

2. Click on the DMS Type listed.

Preferences				×
General		File Access Markups List	Layers	
Interface Tools Studio Window Sets Import/Export	Items in Recent Recent history limit	Enable Recent Files 20 Show preview of PDF 90 Days Clear Open and save files to DMS fi Always Show Selection Dialo		
Advanced Admin		Enable Batch Check in when o SharePoint	closing Sets	
	DMS Type	Location	Status	
		https://doa.dtfmdocs.wiscons	in (_ ready	
	Import Export		OK Canor	

3. Click on the X.

Preferences			×
General		File Access Markups List Lay	ers
Interface		C Enable Recent Files	
Tools	Items in Recent:	÷ 20	
Studio		Show preview of PDF	
Window	Recent history limit:	90 Days V Clear	
Sets		Open and save files to DMS from	toolbar only
Import/Export		Always Show Selection Dialog	
Advanced		Enable Batch Check-in when clos	ing Sets
Admin		SharePoint Op	tions
	t MS Type	Location	Status
	St wePoint	https://doa.dfdmdocs.wisconsin.(ready
	+ 🗙 🕩 🕒		
	Import Export		OK Cancel

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

Delete Do	ocument Management System	×
?	Are you sure you want to delete the Document Managem System for SharePoint at https://doa.dfdmdocs.wisconsin.gov/"?	lent
	Yes	No

5. Click OK.



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

Preferences			
General	Options Doe	ument Nevigation Grid & Snap Spelling	
Interface	User	Matt Dapp (DFD)	
Tools	Language	English (US)	
Studio	Theme:	Dark	
Window	Tab Truncation:	Start	
Sets	Tab Truncaborc	Share Show Full-Screen Crosshair	
Import/Export	Startup Mode:	Last Used	
Advanced		Toggle Full Screen with View Mode	
		Reopen Files from Last Session on Startup	
		Open Home Page in Web Tab on Startup	
		Show Recent Files on Startup	
		 Help Bluebeam improve its products and services by automatically sending usage data 	

- 3. Click OK.
- 4. Go to: <u>https://studio.bluebeam.com/Default.aspx</u>
- 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.

My Sessions My Profile	matthew.dap	p1@wisconsin.gov
	E-mail Default Name Validated Update profile	matthew.dapp1@wisconsin.gov Matt Dapp - DFD

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.

	^	Name	Date modified	Туре	Size
✓ ★ Quick access		Administrators Office	12/14/2021 1:03	File folder	
	*	Bureau of Architecture Engineering	2/10/2022 3:28 PM		
Documents	*	Bureau_of_Cap_Budget_Const_Admin	2/17/2022 12:21	File folder	
Downloads	*	Division_Documents	1/4/2022 10:04 AM	File folder	
Pictures	*	RecordDrawings	3/28/2019 3:44 PM	File folder	
🐨 DFD (G:)	*				
5.0 Budget_Information					
Added Contract Work					
Desktop					
DOA.					
> 🐺 Dropbox					
> 🌰 OneDrive - State of Wisconsin					
This PC					
> 🗊 3D Objects					
> Desktop					
> 💽 Documents					
> 🕹 Downloads					
> 🌛 Music					
> Fictures					
> 📑 Videos					
> 📣 Windows10 (C)					
> 🖝 dappmsajw (\\accounts.wistate.us\DOA	N/ur				
> 🐷 DFD (Gc)					

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



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

Manage Profiles		/	×
Profiles	/		
Active: Revu			~
Profile			
Revu			
Revu Advanced			
Quantity Takeoff			
Field Issues DOA-DFD			
DOA-DFD			
Import Export	Include Dependencies	Add Mod	lfy Delete
Location: C:\Users\V	nawledxjdt\AppData\Roaming\Blu	ebeam Software\Revu\20	\ •
		T	OK Cancel

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



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

Mana	ge Tool Sets			×
Tool	Sets			
	Name	Path	Show In All Profiles	^
		My Tools.bbx Recent Tools	Yes Yes	
∇		PROJECT MANAGER.btx SITE CIVIL UTILITIES.btx		
х		ARCHITECTURE.bbx INTERIORS.bbx		
		PLUMBING.bbx AGENCY TOOLSET.bbx		
	LANDSCA	LANDSCAPE ARCH.bbx LIGHTING POWER.bbx		
	HAZARD_	HAZARDOUS MATERIALS.btx CONSTRUCTION REP.btx		
		STRUCTURAL.bbx		~
	Import	port	Add M	odiły
			[OK

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

10

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.



- 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**.

Manage Tool Sets		×
Tool Sets		
■ Recent To PROJECT	Path My Tools.btx Recent Tools PROJECT MANAGER.btx SITE CIVIL UTILITIES.btx	Show In All Profiles Yes Yet
Import Exp	ort	Add Nodify
		ОК

Working with Sessions

CREATING A BLUEBEAM SESSION ACCOUNT (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.)

USING SESSIONS IN BLUEBEAM

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:

- 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</u> shown on page 2.
- 5. Next Check Out each document by selecting the box next to each document. A blue arrow will appear.



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).

∃ Scope : 4.	Version History	
1	21L2S-00-PR-Cost Estimate-TEST	Workflows
1	21L2S-00-PR-Drawings-TEST	Download a Copy
1	21L2S-00-PR-Specification-GPC-TEST	
		Shared With

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.

· \	∃ Scope : 4. Pre	lim Design (3)
	5	21L2S-00-PR-Cost Estimate-TEST
	a	21L2S-00-PR-Drawings-TEST
	5	21L2S-00-PR-Specification-GPC-TEST
	Add docume	ent
21L2S-00-PR-Specpdf	21L2S-	00-PR-Drawpdf

- 13. Click the up arrow next to one of the documents.
- 14. Select Show in folder.

	Open when done Always open with system viewer Pause Show in folder
	Cancel
21L2S-00-PR-Specpdf	21L2S-00-PR-Drawpdf 21L2S-00-PR-Costpdf

- 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.

₩ Share View		-
← → · ↑ ↓ This PC > Windows10(C) :	Users > hawledrijdt > Downloads	🕹 🔎 Search Downloads
Desktop	e A Nerre	Date modified
Downloads	* V Today (3)	
🗵 Documents	21L25-00-PR-Specification-GPC-TEST (1)	2/13/2023 2.45 PM
Ridues	21L2S-00-PR-Drawing-TEST (1)	2/13/2023 2-19 PM
Mine	21L25-00-PR-Cost Estimate-TEST (1)	2/13/2023 2:19 PM
Old Drafts	Open	
CneDrive - State-of Wisconsin	Print	
PR Review	 Move to One 	Orive
OneDrive - State of Wisconsin	😢 Combine file	s in Acrobat
 Desktop 	(A) Share	
Decuments	Give access b	
eBuilder		- · ·
	T Combine File	
IS Bus Auto Analyst Interviews	T Convert Files	In Revu
LargeHighRisk/TPlan	Send to	>
Microsoft Teams Chat Files	Cut	
 Personal Work Items 	Copy	
Richards		

- 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.

Name	Date modified	Туре	Size
21L2S-00-PR-Cost Estimate-TEST (1)	1/19/2023 3:53 PM	PDF Document	97 KB
21L2S-00-PR-Drawings-TEST			4,063 KB
21L2S-00-PR-Specification-GPC-TEST	Open		5,086 KB
	Print		

- 22. All documents will open in Bluebeam Revu 20.
- 23. Confirm you are in Mark Up Mode by going to **Revu > Markup Mode.**



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: <u>https://doa.wi.gov/Pages/Bluebeam-Technical-Review.aspx</u>. (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**.



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.

Click Add Open Files.							
Start Stu	dio Sessio	n					×
Session Docum	Name: 21L2S, PR Review, Goodhue Hall, UW-Whitewater						
	e name			Path			
	dd Open F	les				Add	
ananan M	Permission Save As Print Markup Markup Add Doc	uments ttendees	by Email Ac		· · 5:	00 PM ᅌ	
	Jession E	vhiica	Jan 23,	2023	ОК	Canc	el

29. Click

30. The files will be added to your Bluebeam review session.

Start Studio Session X					
Session Name: 21L2S, PR Review, Goodhue Hall, UW-Whitewater Documents					
File name Path 21L2S-00-PR-Cost Estimate-T G:\Division_Documents\A 21L2S-00-PR-Drawings-TES G:\Division_Documents\A 21L2S-00-PR-Specification-G G:\Division_Documents\A	/				
Add Open Files Add Options					
Permission Save As Print Markup Markup Alert Add Documents					
Restrict Attendees by Email Address Session Expires Feb 09, 2023 5:00 PM					
OK Can	cel				

- 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.

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

Invite Users			×
Add Emails to Invite			
	Get Started with one of these options		
	Type or Paste Emails		
	Add Emails from Groups		
	Use Address Book	0	
		Add Message Invite	Participarto

35. Open each of the documents associated with the review session. These are located on the left side of the screen under **Documents**.



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**.

21L2S, PR Review, Goodhye Hall, I 🕀 🕴					
My Status:	:	<u> </u>		\searrow	
✓ Atten	dees		ß	<i>۲</i>	
Joined	Not Joine	ed (0)			
Online (1))				
😚 Denise	Hawley	21L2S-0	0-PR-S	pecific	

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:

<u>G:\Bureau_of_Architecture_Engineering\BLUEBEAM\Transmittal_Notice.</u>

Attendee Acce	555		×
Ses Attendee Acc	Name: 21L2S sion ID: 527-64	py Invitation	Hall, Utt Whitewater
Access	Attendees by En	Email	
Allow	Deny		Add OK Cancel

Note: This is the end of setting up a review session.

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: <u>https://doa.wi.gov/Pages/Bluebeam-Technical-Review.aspx</u>.

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.

Subject	Page Label ^	Comments	Author	Date
	,	hatching for materials discussed during the 1/25/2021 PR review meeting. LABEL LOCATIONS OF TRACKING PADS	Matt Dapp (DFDM)	1/6/2021 8:01:41 AM
C. REPROJECT MANAGER	7	Site will likely be tire washing as tracking pads will take up more room than what is available. Will revise for FR. Note 21 gives the option between tracking pads and tire washing. Will revise documents for FR.	Justin	1/25/2021 503:37 PM
PROJECT MANAGER		WHAT IS '*' FOR?	Matt Dapp (DFDM)	1/6/2021 8:05:41 AM
C., Re: PROJECT MANAGER		Will remove for FR. Also, will revise to laydown and stockpile area for FR.	Justin	1/25/2021 5:96:22 PM
Hectangle			Nathan Elliott	1/25/2021 11:52:31 AM
× ∮(9) ↓ Gallout		A tool cat with a loaded total operating weight of 8,100 lbs will be used to clear snow. The brush is 7 feet at widest point. Please design the ramp to have a minimum of 8 foot of width between the inside of the railings. Please add structural	Jeff	12/18/2020 10:55 13 AM

- 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**.



- b) Select CSV in the Export As field.
- c) Select a location to save the report to.

Fits Name Pages 21L25:60-PR Specification GPO TEST pdf All Pages (1 - 192) Add Remore Save Corumne Fibe and Sort Output Deport as: CBV Economic Corumne Fibe and Sort Output Pages Save Lond Corumne Fibe and Sort Output Deport as: CDV Histon_Documents/AL Projects_3x_Apency's Closed Projects/ Images Overance Save Lond Overance Save Save Overance Save Lond Overance Save Lond Overance Save Save Overance Save Save Overance Save Save	irkup Summa	iy	_	
Name Pages 21125-00-PR Specification GPC TEST.pdf All Pages (1 - 192) Add Remove Add Remove Columns Filter and Sort Columns <				
21L25-00-Pik Specification GPC-TEST.pdf Alf Pages (1 - 192) Add Remove Save Corumes Filter and Stot Output Doort is: 6/00-restor Corumes Corumes Filter and Stot Output Doort is: 6/00-restor V Overwrite Existing Filte Overwrite Existing Filte V Filter anne: 21L28-00-PR Specification GPC-TEST V Overwrite Existing Filte Overwrite Existing Filte V Filter anne: 21L28-00-PR Specification GPC-TEST V Overwrite Existing Filte Overwrite Existing Filte V Filter anne: 21L28-00-PR Specification GPC-TEST V Overwrite Existing Filte Overwrite Existing Filte V Include: Markupo Totals Ø Column Insuders ID Columns Ø ID Columns V Ø ID Columns V Ø Forniat Numbers Forniat Numbers				
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Corumns Fiher and Sort Output Equat as CdV Equat as CdV United South Corumnits/AL Projects.by:Agency/z Globed Projects) Overante Exercising Hile File name: 2112860 PH/BasedEcades-GPC-TEST Coruste Multiple Reports Pir Subject Append Date to This Include: A Manupa & Totals Column Headers In DictoreMeasurement Units Finduce Mainsurges	211.25-00-1	% Specification GPC-TEST.pdf		All Pages (1 - 192) v
Egent az CSV Cverwite Szeling Hie '' I'le name 2112560 PRőpecification-GPC-TEST Cruste Multiple Signatis Alle Pré Subject Append Date to Title Includaz Markupa S Totals Markupa S Totals Column Headers	Add ~	Remove		Save. Load.
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Overwine Lasting He File name: 21L25:d0-Pil-Baecification dPC-TEST Oreate Multiple Reports Per Subject Append Date to Title Include: Markups Totals Markups Totals Cochron Headers In Columnin (include Measurent Units Format Numbers	Export as:	csv		
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Create Multiper Reports Per Subject Append Date to Title Includer Markups Totals Markups & Totals Column Headers Di Di Columns Column Aument Units Format Numbers Format Numbers		Overwrite Existing File		
Aopend Date to Title Include: Markups Totals Markups & Totals Column Headers Documn Headers Documn Headers Documns Format Numbers Format Numbers	File name:	21L2S-00-PR-8pecification-GPC-TEST		
Include:		Create Multiple Reports Per Subject		
Totats Manupo & Totats Column Headers Column Headers Bo Column Headers Column Headers Columns Columbe Massurement Limbs Columbe Massurement Columbe M		Append Date to Title		
Markupa & Totala Obumn Headars Ib Column s Ib Columns Ir Include Maasurement Units Format Numbers	Include:	Markups		
C Column Headers ID Columns () ID Columns () Include Massurement Units () Format Numbers		🔿 Totals		
ID Celumns Include Massumment Units Format Numbers		Markups & Totals		
☑ Include Measurement Units ☑ Format Numbers		Column Headers		
G Format Numbers		D Columns		
🖉 Rupika				
		🕢 Repika		
Open File After Creation Save Config Load Config	I Open Fi	e After Creation		ve Config Load Config

- 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."
 - Go to **My Status** and click the down arrow.
 - Select **Finished**.

Studio ~	ER	ø.
21L2S, PR R	eview, Goodhue Hall, (📑	†∔†
My Status:	Finished	
 Attend 	Finished Reviewing Wating	

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.



- 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

Finish Session	×
21L2S, PR Review, Goodhue Hall, UW-Whitewater - 544-687-639 Include Markups	
Name Email Denise Hawley - DFD denise.hawley1@wisconsin.gov	
<	>
Save Options Save (Overwrite Existing) Save In Folder G:\Division_Documents\All_Projects_by_Agency\z Closed Session Subfolder Do not save files	
Close files after finishing Report Options Generate Report C:\Users\hawledxjdt\OneDrive - State of Wi Setting	JS
ОК Са	ncel

- 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.)

49. Once documents have been saved to the project folder, you will receive a completed message.

50. Click **OK**.



- 51. Go to SharePoint (<u>https://doa.dfdmdocs.wisconsin.gov/</u>) and select your project folder.
- 52. Go to File Explorer **Least** 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.

Name	Date modified	Туре	Size
21L2S-00-PR-Cost Estimate-TEST	1/26/2023 2:49 PM	PDF Document	97 KB
21L2S-00-PR-Drawings-TEST	1/26/2023 4:46 PM	PDF Document	4,063 KB
21L2S-00-PR-Specification-GPC-TEST	1/23/2023 3:54 PM	PDF Document	5,089 KB

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.

	22C4Z-00-FR-Project Schedule	Preliminary Review Document		9/15/2023 10:31 AM	Ray White	0.9
	22C4Z-00-PB-Cost Estimate	Preliminary Review Document		9/15/2023 10:31 AM	Ray White	0.7
-	22C4Z-00-PR-Drawings	Document		10/2/2023 3:59 PM	Ray White	0.2
-	22C4Z-00-PR-GPC Front End	Document		10/2/2023 3:59 PM	Ray White	0.2
8	22C4Z-00-PR-MEP Front End	Document	•	10/2/2023 3:59 PM	Ray White	0.2
	22C4Z-00-PR-Project Schedule	Preliminary Review Document		9/15/2023 10:31 AM	🗆 Ray White	0.7
	22C4Z-00-PR-Specifications Vol 2	Document		10/2/2023 3:59 PM	Ray White	0.2
	22C4Z-00-SD-DRAppendix	Design Report	Design Report Summary	9/15/2023 10:31 AM	Dapp, Matthew - DOA	0.18
E	22C4Z-00-SD-DRSummary	Design Report	Design Report Summary Post	ted 9/15/2023 10:32 AM	Dapp, Matthew - DOA	0.25

60. Click Files.



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

63. Leave minor version selected

64. Update "Retain your checkout after checking in?" to Yes.

Check in		×
Version Select the type of version you would like to check in. 'Overwrite the current minor version' is not available when checking in multiple items.	What kind of version would you like to check in? Minor version (draft) Major version (publish) Overwrite the current minor version 	
Retain Check Out Other users will not see your changes until you check in. If you wish to continue editing, you can retain your check out after checking in.	Retain your check out after checking in? • Yes No	
Comments Type comments describing what has changed in this version.	Comments:	
toot Entimate Dustra	OK Can	cel

65. Click **Ok**.

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

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**.

		Open In Revu
	\rightarrow	View in Browser
		Convert to PDF
		View Properties
□ □ _{Type}	Name	Edit Properties
∃ Scope : 4. Pr	elim Design (3)	Compliance Details
- 🛃	21L2S-00-PR-Cost Estimate-TEST	Check In
1	21L2S-00-PR-Drawings-TEST	Follow
	21L2S-00-PR-Specification-GPC-TEST	Discard Check Out

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

∃ Scope : 4.	Prelim Design (3)	Follow
1	21L2S-00-PR-Cost Estimate CEST	Discard Check Out
□ 👪	21L2S-00-PR-Drawings-TEST	 Version History
	21L2S-00-PR-Specification-GPC-TEST	Workflows
Add doc	ument	Download a Copy
Go to File	e Explorer I and select Downloads .	
File	Home Share View	
$\leftarrow \rightarrow$		
1		
		Name

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

Desktop

Downloads

Today (3)

21L2S-00-PR-Drawings-TEST (3

ADDITIONAL INFORMATION

Note: Users can reactivate a Session within 120 days of closing it, if needed. To reactivate a review session:

- Go to <u>https://studio.bluebeam.com/Default.aspx</u>
- 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; <u>disconnecting from VPN</u> <u>also helps speed up the process</u>
- 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**.