Host a Bluebeam Studio Session

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For technical support you can email support@bluebeam.com, that will create a service ticket for your incident.

For additional training materials check out our training videos at the following link:
https://dot.sd.gov/doing-business/engineering/design-services/forms-manuals#listItemLink_1552

For submitting questions or revisions to this guide, please contact Rebecca Urban with the contact information above.

The following will guide an individual on how to set up and host a Bluebeam Studio Session for SDDOT/FHWA reviews using SDDOT best practices. Hosting a Bluebeam session is not limited to only SDDOT/FHWA reviews, the following can also be easily adapted anytime where collaboration on a project might be desired. It can be developing a work order or give any individual the ability to view and or comment on an issue. A studio Session is simple to start, and a report can be generated for documentation.

SDDOT Best Practices:

- o Adding individual documents such as Special Provision Checklist, PCN#_SectionA, PCN#_SectionB etc. to the review session. The individual pdf's allow reviewers a more systematic and simplistic approach when reviewing large review sessions that are common with Section Method reviews. It also gives the host some freedom to start a review session when not all documents to be reviewed are available; this is not ideal but does give flexibility to the host. The larger the review the larger the benefit is to our reviewers to have the pdf's separated out by Session Cover Letter, Checklists, Special Provisions and Plan Sections. When hosting a NonSection Method review keep the PCN#_NonSection separated from the Session Cover Letter, Checklists and Special Provisions
- o Send Review Sessions out through Outlook and not through Bluebeam Revu. When Bluebeam Revu sends invitations out it is difficult for the host and especially to invitees to see who was all invited, this is important for offices that forward invites on to all their office reviewers. Also, when Bluebeam Revu sends invitations out, they are received in SDDOT Outlook Inbox as an "EXT" email and has resulted in invitees missing reviews.
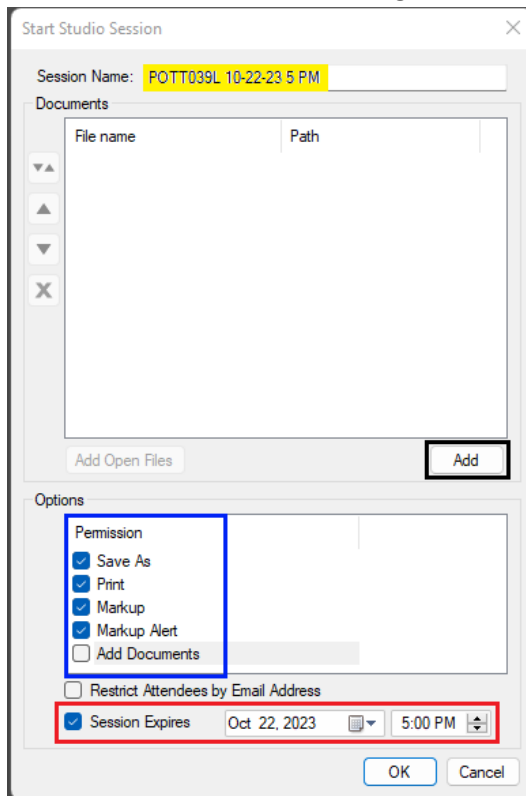
Start SDDOT electronic plan review session

The Host will need to start a Studio Session.

- In the Studio tab select "New Session" in the drop-down menu under "+".
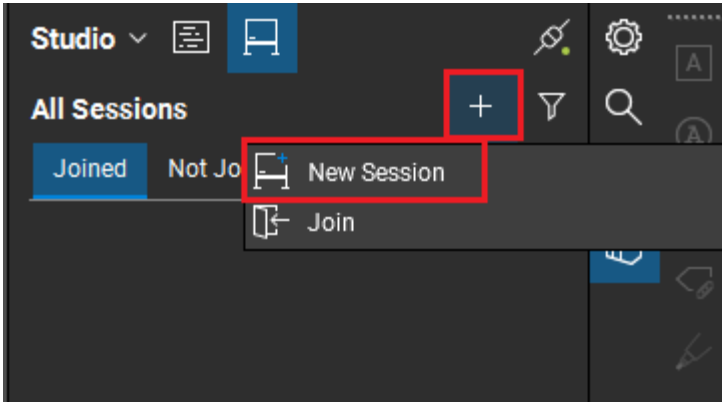

- In the "Start Studio Session" dialogue box

- Session Name: (Highlighted in Yellow) County PCN# Review Due Date Time, Example - Penn00WZ 08-15-18 5 PM
- Pdf's can be added multiple ways (Black Box)
  - Add Open Files – This adds files that are currently opened in Revu
  - Add – This adds files through file explorer
  - Add files later after the Session has been started (See Below "Adding Documents in a Session")

- Options – Can be adjusted after the Session has been started (Circled in Blue)
  - Permission
    - Check "Save As"
    - Check "Print"
    - Check "Markup"
    - Check "Markup Alert"
    - Do Not Check "Add Documents"
- **Do Not** Check "Restrict Attendees by E-mail Address"
  - This allows SDDOT best practice of forwarding e-mail to others that need to review the plans
- Check "Session Expires" (Circled in Red)
  - Use Drop down Menus to set Date and Time
  - Session Expiration can be adjusted during the review (see "Managing a Review Session")
- Select "OK"
  - "Session Invitation" will open.
- In the "Session Invitation" dialog box
  - A (SDDOT Best Practice) is to send out reviews through Outlook and by selecting "OK" Bluebeam Revu populates an email with information entered and sends out the invitations. These invitations from Bluebeam cannot be tracked or documented. When exiting out of the "Session Invitation" dialog box always select "Cancel".
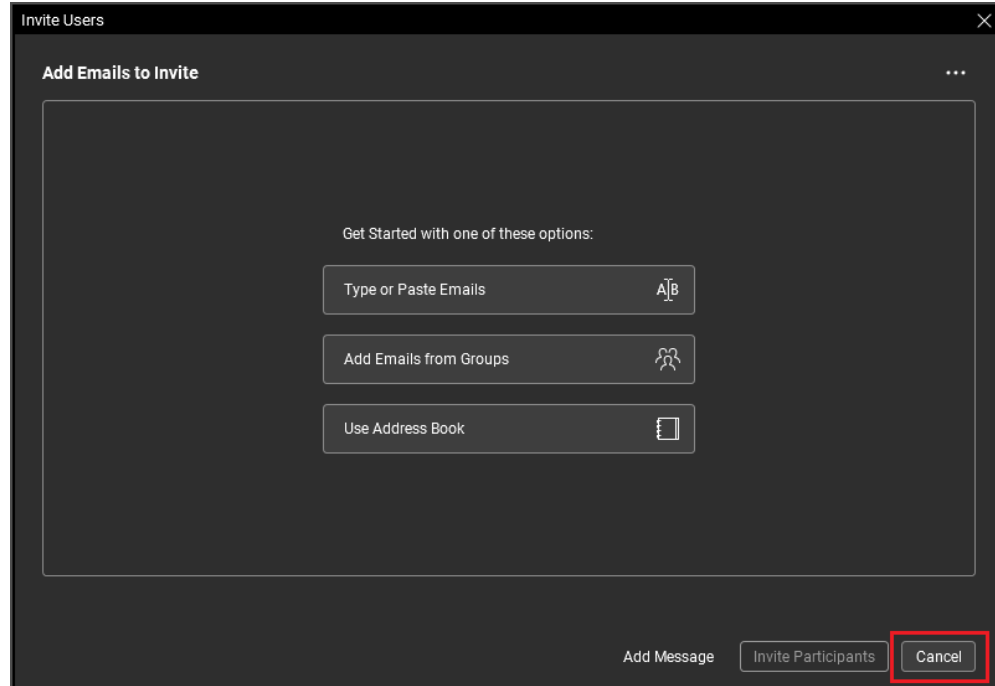
Managing SDDOT electronic plan review session

The Host will need to manage a Studio Session Review. This includes sending the review out to possible reviewers and allowing others to view who all the review was sent to.
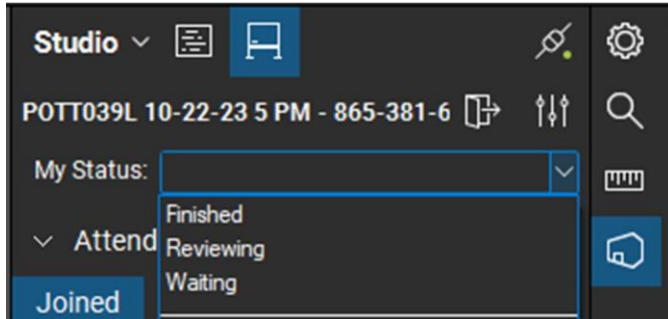
In the Session the name of the review is shown, set your status to "Reviewing, Finished etc.", send invitations out via a copied link, add documents to the review and manage the review through the settings.

Session Invitations Through Outlook

Create an Outlook e-mail:

Subject: You're Invited to Review County PCN# Review Due Date Time

Email Body:
- Reference the project
  - RE: Project Number, County, PCN
             Location Description
             Improvement Description
- Copy Invitation and paste into email
  - To open Session Invitation dialog box click the Invite (envelope icon) at the top of the Attendees section in the studio session.
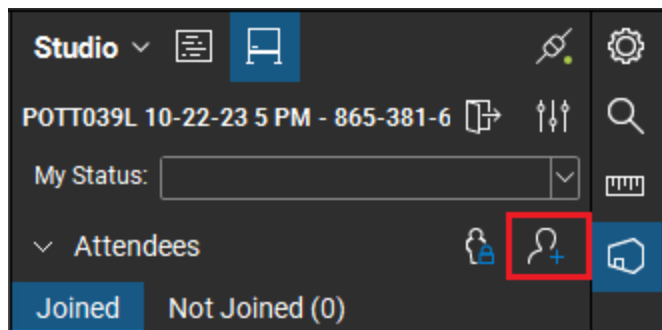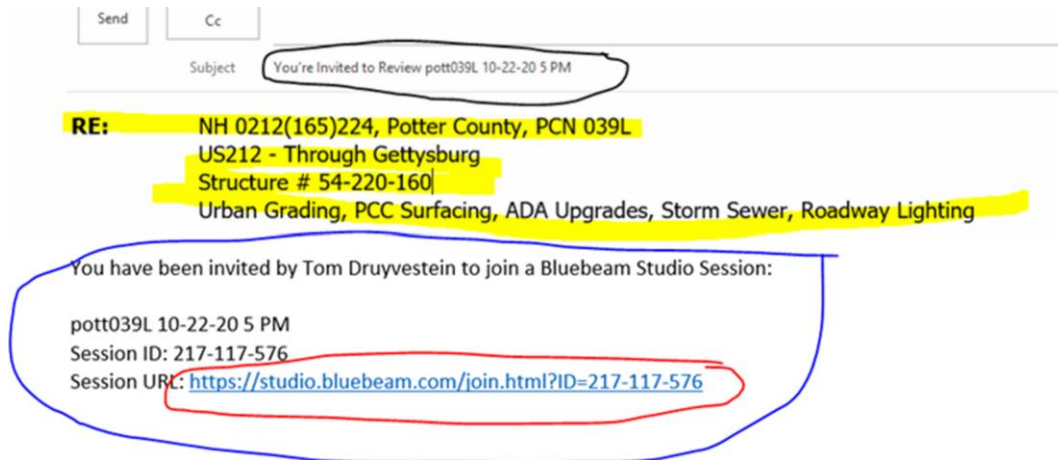
o   Select the "Copy Invitation", then paste into the Email Body.
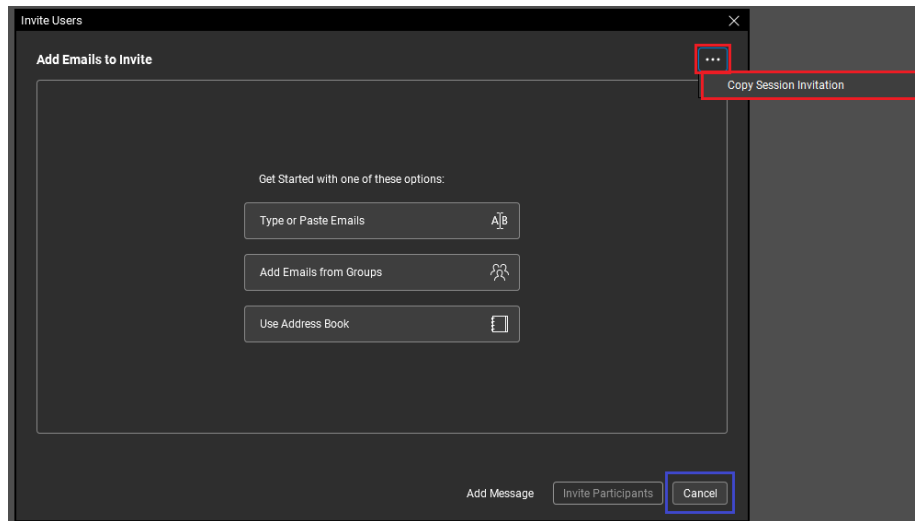
o   Finally, close out of the Session Invitation dialog box by selecting "cancel".

- Email Example

Giving Another User Full Control

When creating a review session, a best practice can be to give someone else full control of the session, in case you are unable to manage the session for any reason at any point in time (Road Design should do this step for every session).

To give full control of a session to another person go to the session settings and go to the permissions tab:
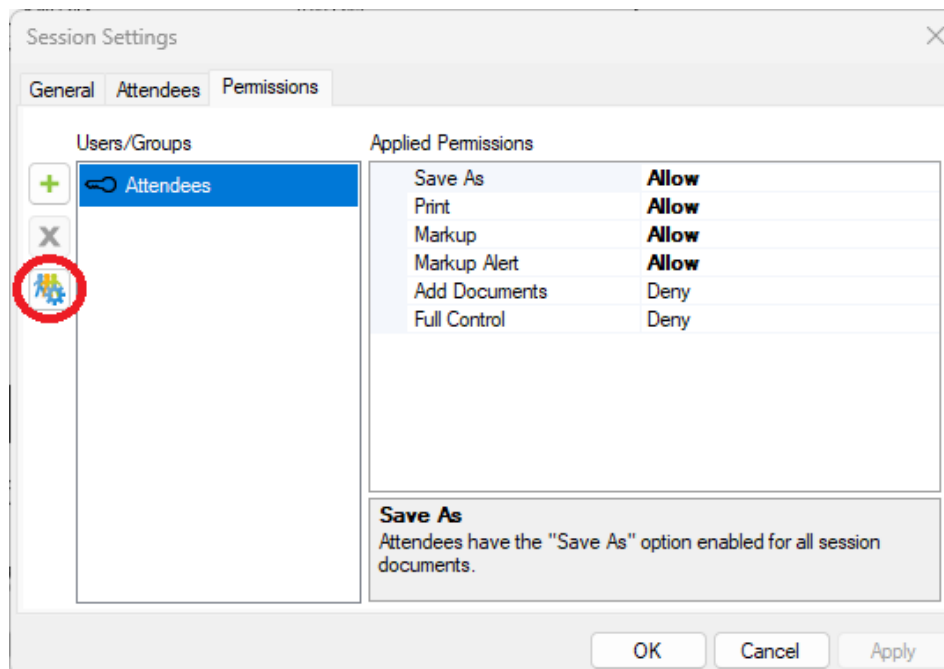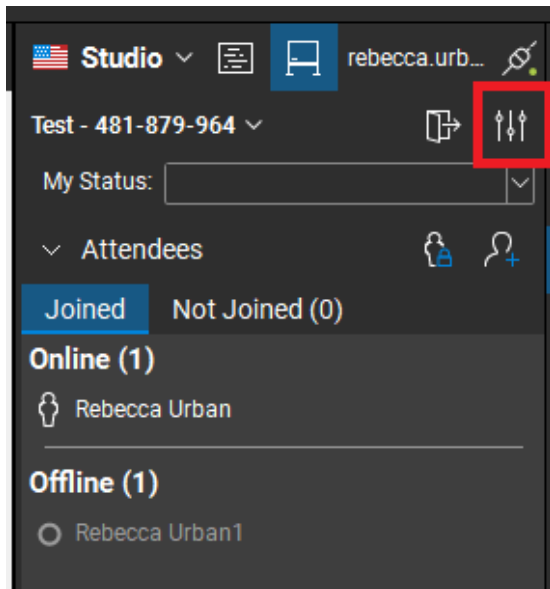
From there you will go to groups (circled above) and create a group with the person you want to give Full Control to. Click the Plus Symbol > Create a name for the group > Click Okay
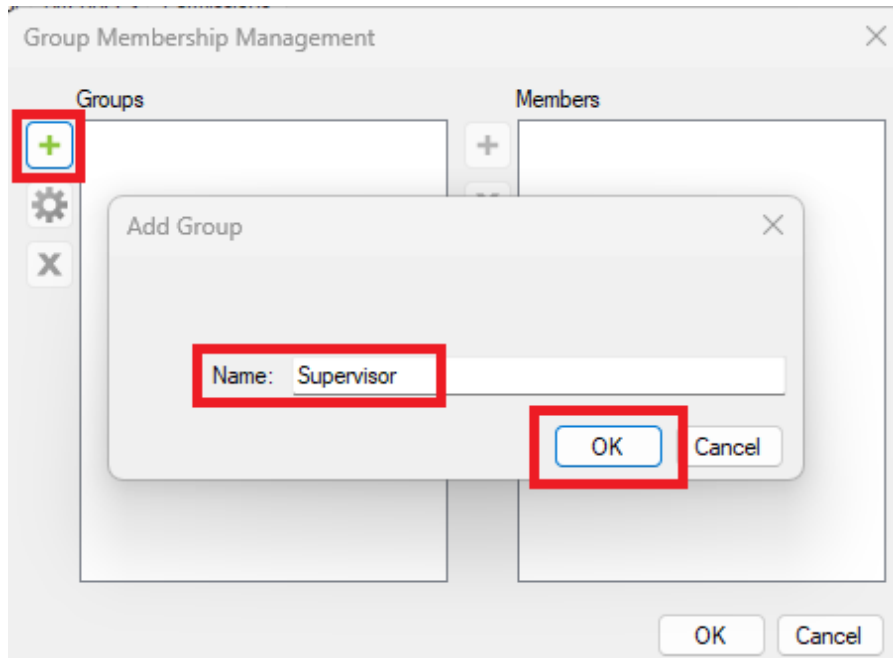

Then you will add the person to the group by selecting the group > Click the Plus Symbol in the Members Column > Type in the persons email address > Click Okay
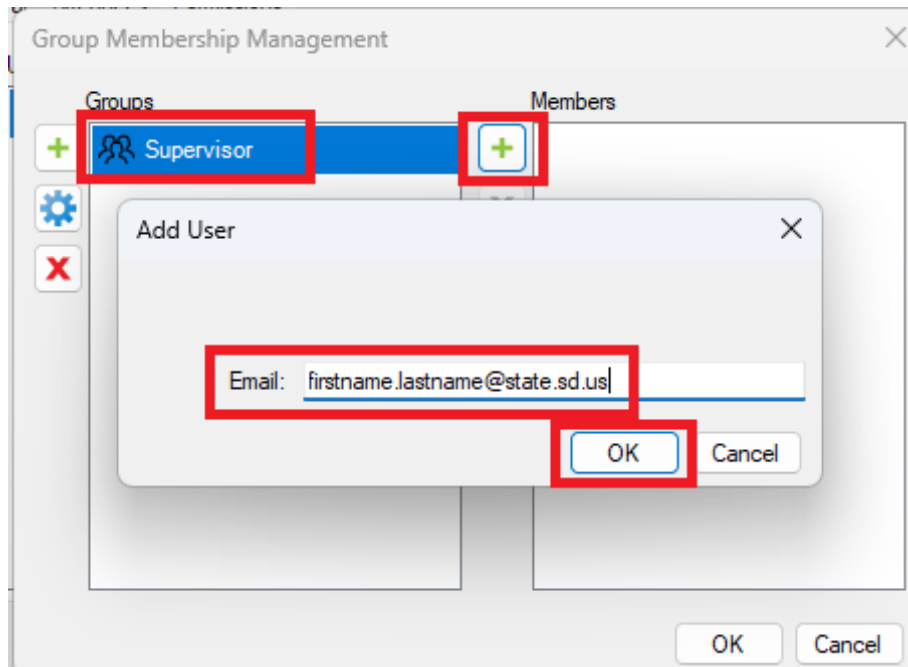
You can then click okay in the Group Membership Management pop up.

Back in the Session Management Popup under the permission tab you will click the Plus Symbol next to the Users/Groups columns > Select the group we just created > Click Okay
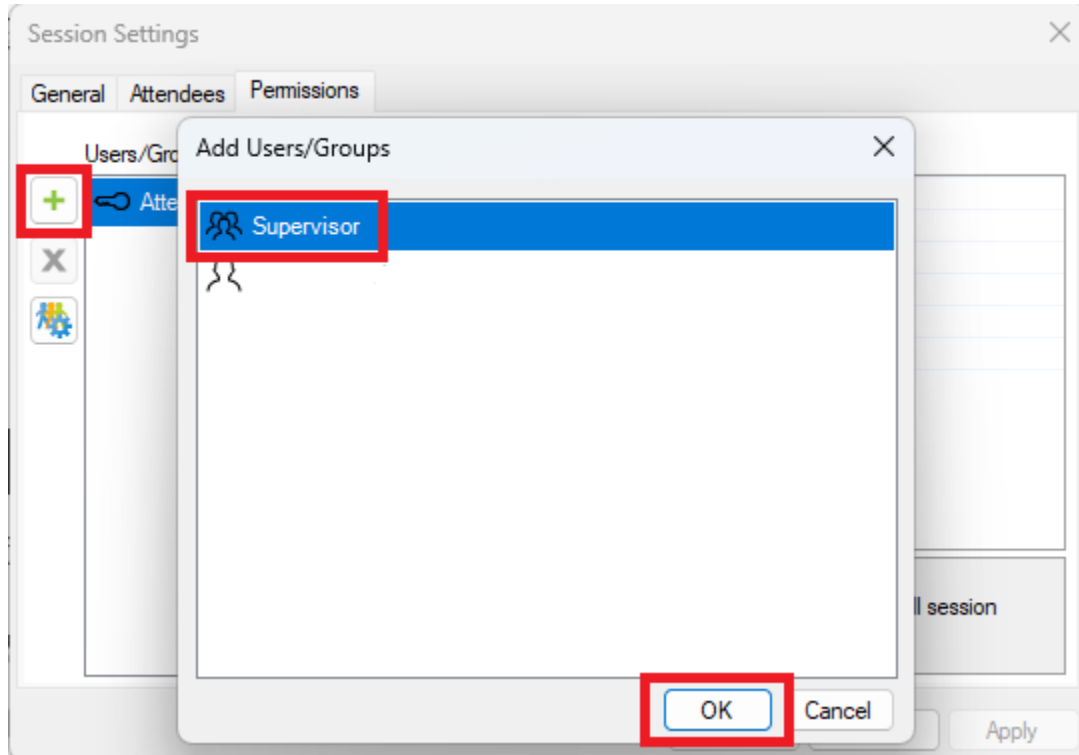
Back in the Session Management Popup we can now select the group we added and change the Applied Permissions to what are shown below and then Click Apply.
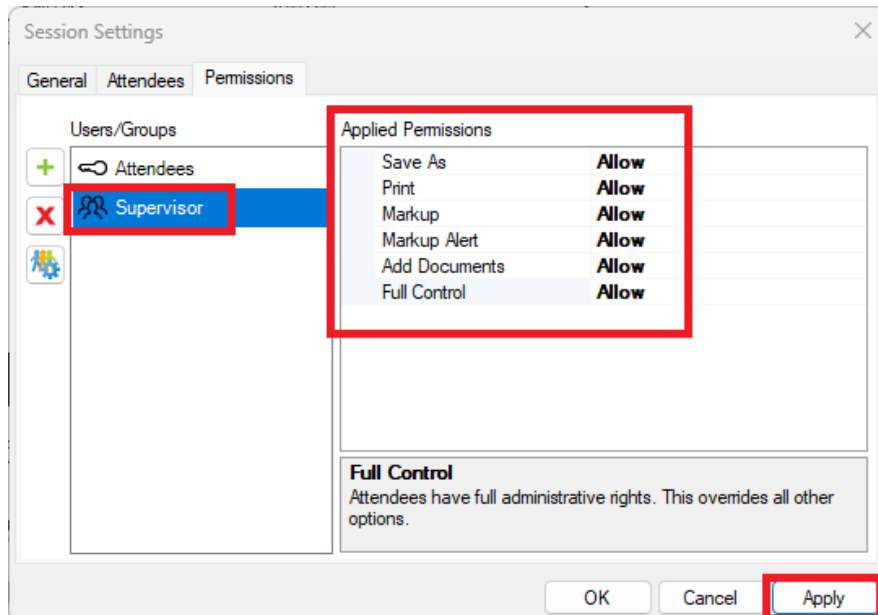
Studio Session Management

The review session can be managed through "Session Settings" in the studio session


(must select apply for any adjustments made)

General Tab: Enable the session to close (expiration) and select the closing date and time, can also manage session notifications in this tab.

Attendees Tab: Can add attendee by email and restrict attendees

Permissions Tab: Set permissions to attendees

- During the Markup portion of the review session set permissions for all to:
    - Save As   **Allow**
    - Print   **Allow**
    - Markup   **Allow**
    - Markup Alert   **Allow**
    - Add Documents **Deny**
    - Full Control   **Deny**
- During the Revision portion of the review session set permissions for everyone except project designers to: (simply change "Attendees" permissions)
    - Save As   **Allow**
    - Print   **Allow**
    - Markup   **Deny**
    - Markup Alert   **Allow**
    - Add Documents **Deny**
    - Full Control   **Deny**

- During the Revision portion of the review session set permissions for project designers to:
  - Save As **Allow**
  - Print **Allow**
  - Markup **Allow**
  - Markup Alert **Allow**
  - Add Documents **Deny**
  - Full Control **Deny**
    - This is accomplished through using permissions tab, use the green plus icon then select individual you want to change preferences for.
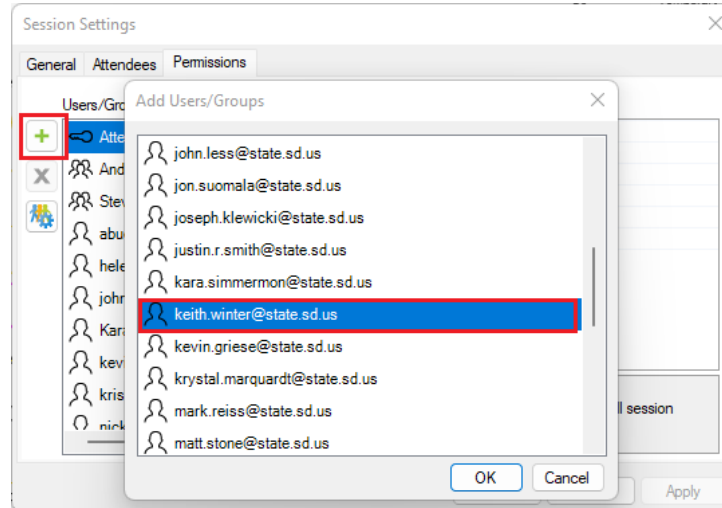

  - **NOTE:** Sometimes designers do not enter the session during the markup portion of the review. This results in them not being populated in the "Add Users/Groups" automatically.
  - To "Add Users/Groups" manually, use the "Group Membership Management" icon to create a group and populate it with members, select OK then select apply. Now you can give permissions to the group you just created.
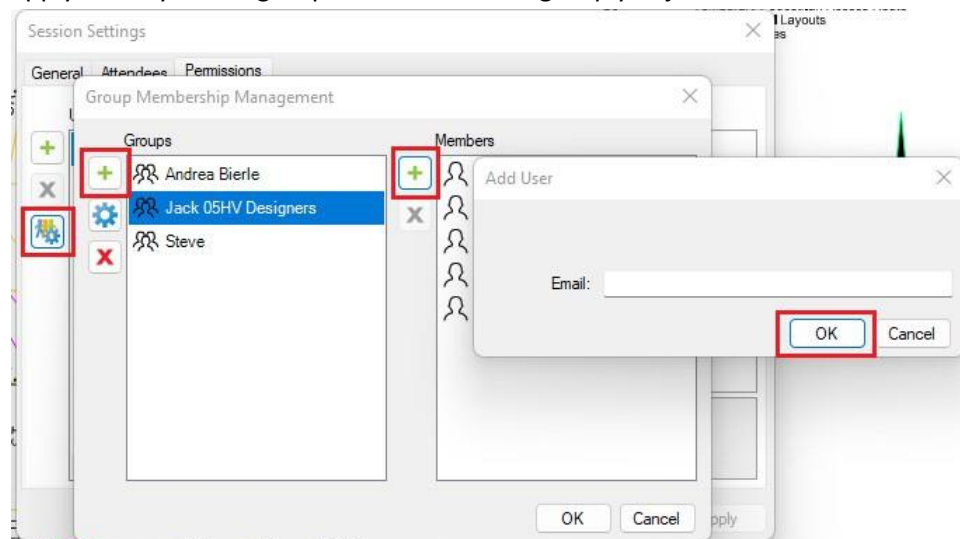
Adding Documents to a Session

- Adding documents can be accomplished through the "Add File" Icon (+). This will route you through your file explorer capabilities on your computer.
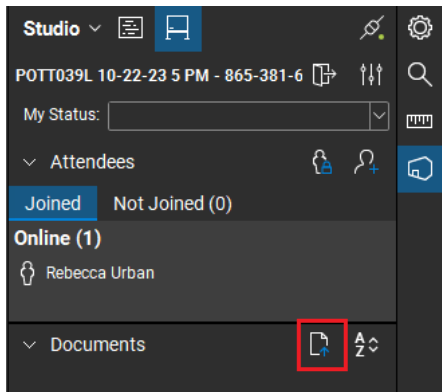
How to Respond to Review Comments

Each consultant/designer is responsible for responding to the comments left in the section(s) of plan(s) that they are responsible for during DOT Review. Each comment should be marked with a status and responded to as necessary.

If a comment is marked "**Accepted/Completed"** the comment is totally complied with. For a comment to be totally complied with the plans should be updated to include all the items specified in the comment. A short description of how the comment was handled can be added but is not required.

If a comment is marked **"Rejected"** this means the comment was not partially or totally complied with. In this case the consultant/designer must reply to the comment with the reasoning for not complying with the comment (ie. Standard Plate/Note, RD Manual, Spec Book, etc.). When a reply is complete the consultant/designer should Alert the Attendee (Reviewer) that made the comment and the Project Manager, so they are aware of the comment being rejected.

No comments should be marked **"Cancelled"** or **"None".**

If a Project Manager notices that comments that were marked Completed during the DOT Review were not addressed/complied with in the plans, the Project Manager should follow up with the Consultant/Designer to verify that the plans are updated to comply with the comment.
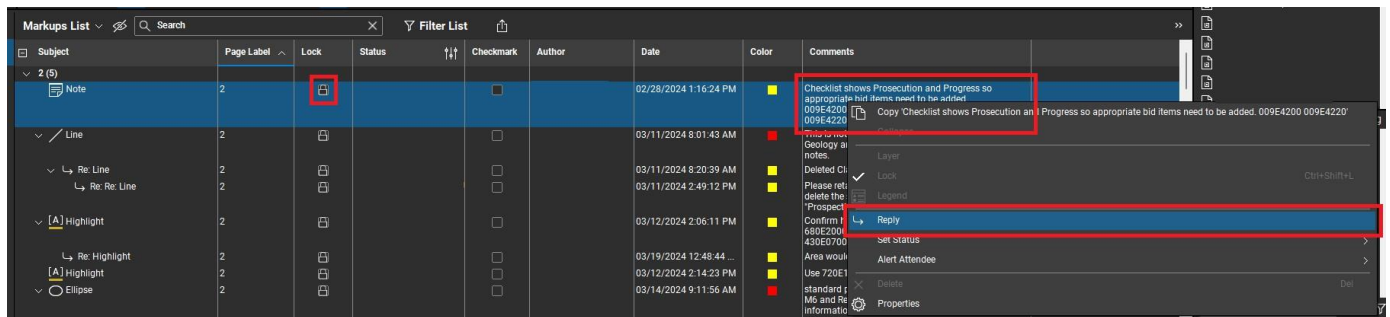
How to Set a Status:

In the Session Markup List > right click on the comment > hover over "Select Status" > Select the Status of the comment (ie. Accepted, completed, or rejected)
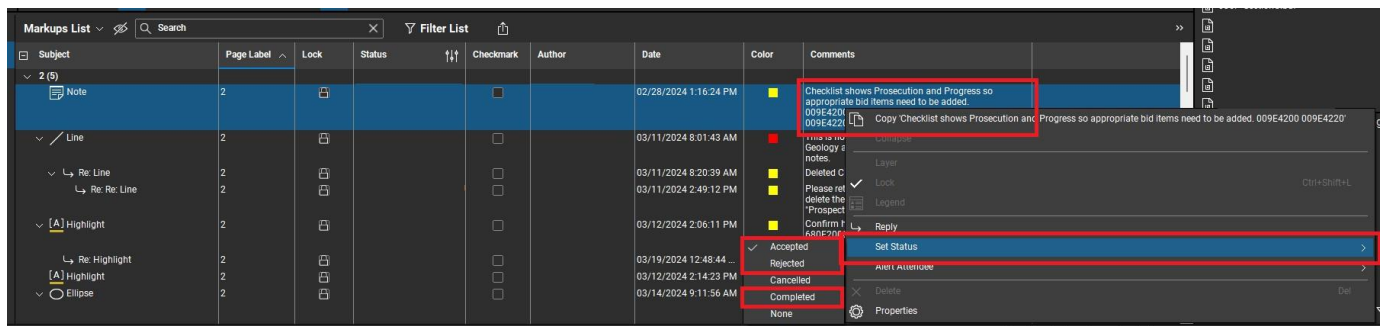
How to Reply to a comment:

In the Session Markup List > Right Click on the comment > Click "Reply"

Once you have completed your reply you should lock it, so it can not be edited or deleted.
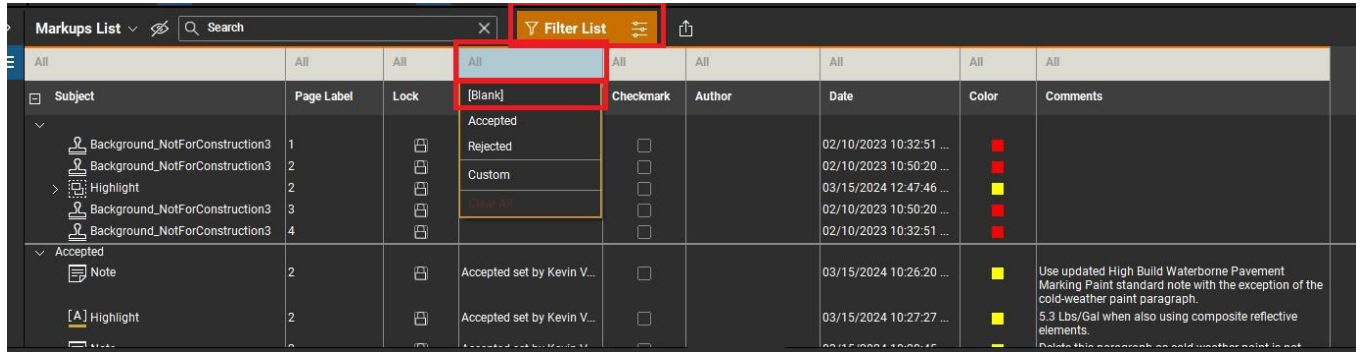

How to Alert an Attendee to a rejected comment and reply:

Highlight the comment and reply > right click in the comment box > hover over "Alert Attendee" > Select "Choose" > Scroll down the list and select the person who made the rejected comment and the Project Manager > Select "OK"
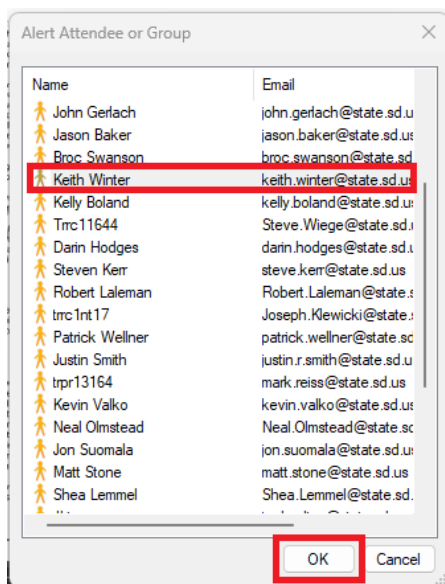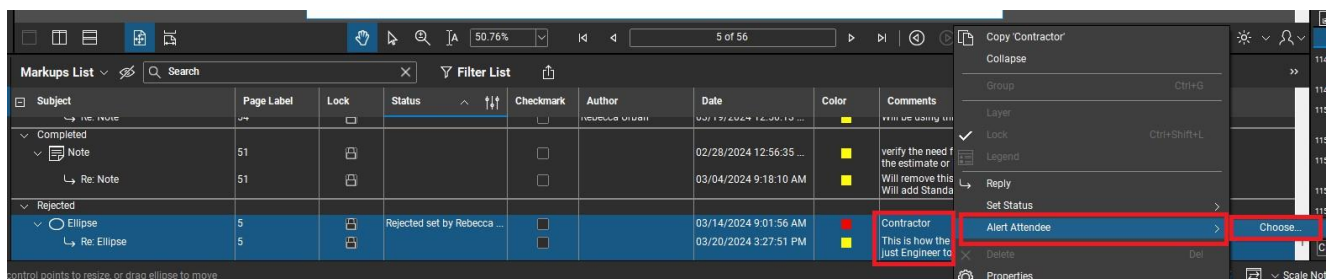
How to filter comments:

In the Session Markups List > Select "Filter List" > Now you can click in the white box above each column to sort the column (ie. Above Status you can select all the comments that are still blank, above author you can select all comments made by any designer, etc.)

Creating Review Session Report

- After the plan review and all the responses are complete the Host will need to generate a Session Report. Click the Report icon in the Record tab for the Review Session.
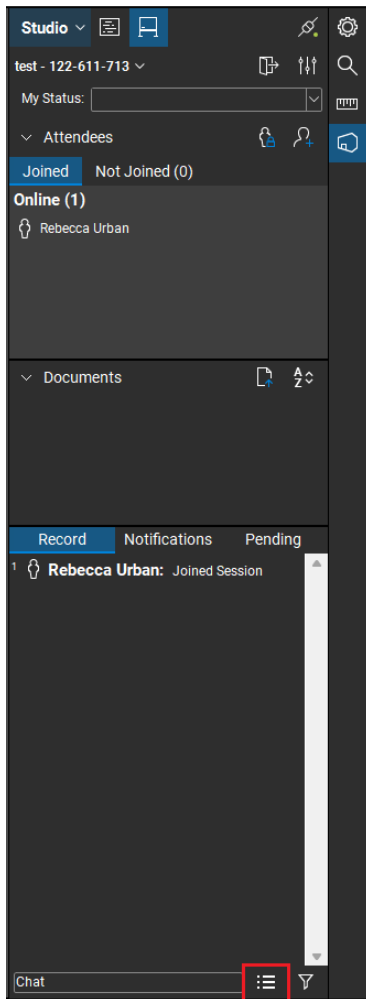
- In the Session Report dialog box select
  - PDF Package Report
  - Letter
  - Include Attendees List
  - Include Documents List
  - Include Record Items
    - Do Not Include Filtered Items Only
  - Columns Box check all
  - When you select "OK" you will need the save the report in the "Review" folder under the project folder titled COUNPCN#_archive. Example CLAY023V_archive

Finish SDDOT electronic plan review Session

The Host will need to finish a Studio Session. Select the Finish icon in the Review Session.
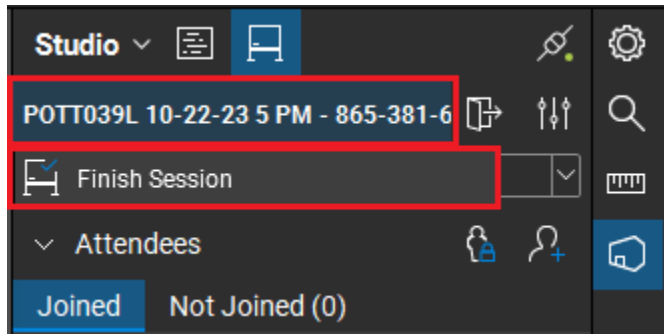
In the "Finish Session" dialogue box, select "Do not save files" and uncheck the "Generate Report"