


QR3 Best Practices: Bluebeam Studio Session Creation

Note: For more detailed information, refer to the Electronic Plan Review Procedure - Studio Administrator

1.0 Log into Bluebeam Studio. First Join Bluebeam PROJECT (not Session)

1.1 (UCSD only) Use the "UCSDBluebeamAdmin@ucsd.edu" email address to login


2.0 Verify UCSF Document Cover Page has been added to Formatted Files

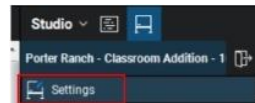
- 2.1 In Bluebeam Project, locate all PDF file(s) to be added to the Bluebeam Session
- 2.2 If unsure that the "UCSD EPR Cover Page" has been added to each file, open files to verify
 - 2.2.1 Right-click PDF document(s) – select  "Check Out"
 - 2.2.2 Right-click PDF document(s) again – select "Open"
 - 2.2.3 Check the first page of each document to verify the "UCSD EPR Cover Page" has been added
- 2.3 Save & Close the Files – be sure to select "Check In" when closing

3.0 Create Bluebeam Studio Session

- 3.1 In Bluebeam Project, locate all PDF file(s) to be added to the new Bluebeam Session
- 3.2 Select (highlight) PDF file(s) to be included in the Bluebeam Session
- 3.3 Right-click while files are highlighted, select "Add to New Session..."
- 3.4 Name Session: *[Project #]_[UCSD] [Project Name] - REVIEW*
 Naming Example (Major Cap): *4466_UCSD Altman Research Institute - REVIEW*
 Naming Example (Minor Cap): *55555_UCSD Altman Bldg AC System Update - REVIEW*

4.0 Add EPR Admin Session Group to the Session & Set Permissions for All



4.1 Click the Session name – drop down menu, select "Settings"
(or press  in Bluebeam 2020)



4.2 In the "Attendees" tab, uncheck the "Restrict Users" checkbox

4.3 In the Permissions tab – change/verify Applied Permissions set as indicated at right for "Attendees":

Applied Permissions	
Save As	Allow
Print	Allow
Markup	Allow
Markup Alert	Allow
Add Documents	Allow
Full Control	Deny

4.4 (Design Team only) Click  to add a "UCSD Administrator" group containing the "AdminBBMajor@ucsd.edu" and/or "AdminBBMinor@ucsd.edu" email addresses (create Groups by clicking )

4.5 In "Applied Permissions", set "Full Control" permission to "Allow" for Admin Session Group

4.6 Click "Apply" & "OK"

5.0 Invite Reviewers to Bluebeam Session

5.1 Click Invite  in the Session tab

- 5.1.1 Click the "Copy Invitation" button
- 5.1.2 Open outlook and paste the invitation link into the email
- 5.1.3 Refer to Exhibit E: Email Templates for additional email text to paste