

#### List of Current Exhibits and Quick Review (QR) Guides for UCSD

#### **Exhibit A: UCSD Electronic Plan Review Cover Sheet**

The UCSD Electronic Plan Review Cover sheet defines the responsible party for each of the Bluebeam-related project tasks, and the UCSD Departments reviewing the project. It is inserted as the first page in all submission documents requiring UCSD review.

#### **Exhibit B: Bluebeam Studio Account Setup**

Including creating account, new/exciting account preference setup, display name verification.

#### Exhibit C1: Bluebeam Studio Project Folders - Major Capital Program

Bluebeam studio project folders structure and naming.

#### Exhibit C2: Bluebeam Studio Project Folders - Minor Capital Program

Bluebeam studio project folders structure and naming.

#### **Exhibit D: Document Naming Table for Submissions**

Document type and naming convention table including notes for each submittal phase.

#### **Exhibit E: Email Templates**

Email Templates for Design Team Invitation to Bluebeam Studio Project and the improperly formatted pdf documents.

#### **Exhibit F: Bluebeam Tips and Tricks**

Including adding/deleting leader, callout, changing cloud shape with control points, deleting control points within a markup cloud, locating comments quickly using the dimmer, splitting the screen to compare two documents, using multiple monitors to compare two documents, syncing views on split screen documents, etc.

#### **Exhibit G: Bluebeam Troubleshooting**

Including solving logging errors, Incorrect naming convention correction and Changing the Bluebeam Default Open/Save Location.

#### **QR1: PDF Document Preparation and Validation**

Including checking out/opening, verifying, and check in/saving the documents.

#### **QR2: Bluebeam Studio Project Creation**

Including uploading files, setting up permissions for attendees and inviting users.

#### **QR3: Bluebeam Studio Session Creation**

Including adding a group to session and sending invite to reviewers.

#### **QR4: Bluebeam Studio Session Layout**

Shows a screenshot of the Bluebeam Studio Session with procedure-related areas identified.

#### **QR5: Bluebeam Review & Reconciliation**

Shows the process of Document Markup Review (UCSD Technical Reviewer), the Process of Markup Reconciliation (Design Team) and the UCSD Back Check process.



# Exhibit A1: Major Cap Electronic Plan Review Cover Sheet

Project Name:	
UCSD Project Number:	Phase / Package:

Bluebeam-Related Project Tasks:  1. Creation of Studio Project, including Permissions and Invites 2. PDF Formatting of Documents, including adding Bluebeam Bookmarks & Hyperlinks	Design Team	UCSD	N/A
• • •			
P. PDF Formatting of Documents, including adding Bluebeam Bookmarks & Hyperlinks			
B. Verification of PDF Formatting			
4. Insertion of UCSD Cover Page (insert as page 1 for all files at all submission phases in Bluebeam)			
5. Upload of Files into Studio Project: Design Team Files (at all submission phases)			
6. Creation of Studio Review Session, including Setup and Additional Sessions as needed			
7. <b>Upload</b> of Initial-Phase Submittal Files: <b>into Initial Studio Session</b> from Studio Project			
B. Upload of Subsequent-Phase Submittal Files: into SAME Studio Session (Opt.1)			
9. Upload of Subsequent-Phase Submittal Files: into NEW Studio Sessions (Opt.2)			

	LICED Deportments Devisoring		Reviewing Phases:							
Markup Color	UCSD Departments Reviewing this Project	SD	DD	CD	Submittals	Deferred Approvals	As-builts	Record Docs		
CPM	Capital Program Management PM									
DDSE	DDS Engineering									
DDSI	DDS Inspector									
DDSA	DDS Architect									
CPMC	Capital Program Management Contracts									
IRPC	Independent Plan Review Consultant (IPRC)									
Access	Accessibility									
EH&S	Environmental Health & Safety									
Fire	Fire Marshal									
CD	Client-Department									
FE	Medical Center / Facilities Engineering									
FM	Facilities Management									
Planner	Project Planner									
PP	Physical Planning									
PPE	Physical Planning - Environmental									
ITS	Information Technology Service									
AS/VS	Audio Visual Systems									
PK	Parking									
PD/PS	PD/Security									
FM	Sustainability									
RE	Real Estate									
CxA	Commissioning (CxA)									
HDH	Housing, Dining & Hospitality									
ther Additio	nal Departments Reviewing this Project									
	CEQA Review for Mitigation Measures									
Community	Campus Landscape Architect									
OSHPD	OSHPD									
Client	Client End User Stakeholders as Needed									
Other										
					1					
			1						1	

How to use this document: 1.In the UCSD Project Kickoff Meeting, the Design Team and UCSD Project Team shall fill out this Cover Page together, determining the responsible party for each of the Bluebeam-related project tasks in Section A, and the UCSD Departments reviewing the project in Section B. 2.Once the Sections are filled out, save the PDF. 3.In Bluebeam, open all submittal files requiring Reviewer comments. 4.Use the Document > Insert > Pages from Document... command in Bluebeam to insert this Cover Sheet before the first page in each of the submittal files. 5.Be sure to insert this completed Cover Page into submittal files prior to adding documents into the Bluebeam Studio Session.



# Exhibit A2: Minor Cap Electronic Plan Review Cover Sheet

Project Name:	
UCSD Project Number:	Phase / Package:

	Responsible Party for Execution of				
Bluebeam-Related Project Tasks:	Design Team	UCSD	N/A		
1. Creation of Studio Project, including Permissions and Invites					
2. PDF Formatting of Documents, including adding Bluebeam Bookmarks & Hyperlinks					
3. Verification of PDF Formatting					
4. Insertion of UCSD Cover Page (insert as page 1 for all files at all submission phases in Bluebeam)					
5. Upload of Files into Studio Project: Design Team Files (at all submission phases)					
6. Creation of Studio Review Session, including Setup and Additional Sessions as needed					
7. <i>Upload</i> of Initial-Phase Submittal Files: <i>into Initial Studio Session</i> from Studio Project					
8. <i>Upload</i> of Subsequent-Phase Submittal Files: <i>into SAME Studio Session</i> (Opt.1)					
9. <i>Upload</i> of <i>Subsequent-Phase</i> Submittal Files: <i>into NEW Studio Sessions</i> (Opt.2)					

M1	UCSD Departments Reviewing this Project	Reviewing Phases:							
Markup Color		SD	DD	CD	Submittals	Deferred Approvals	As-builts	Record Docs	
CPM	Capital Program Management PM								
DDSE	DDS Engineering								
DDSI	DDS Inspector								
DDSA	DDS Architect								
CPMC	Capital Program Management Contracts								
IRPC	Independent Plan Review Consultant (IPRC)								
Access	Accessibility								
EH&S	Environmental Health & Safety								
Fire	Fire Marshal								
CD	Client-Department								
FE	Medical Center / Facilities Engineering								
FM	Facilities Management								
Planner	Project Planner								
PP	Physical Planning								
PPE	Physical Planning - Environmental								
ITS	Information Technology Service								
AS/VS	Audio Visual Systems								
PK	Parking								
PD/PS	PD/Security								
FM	Sustainability								
RE	Real Estate								
CxA	Commissioning (CxA)								
HDH	Housing, Dining & Hospitality								
	nal Departments Reviewing this Project	I	ı						I
	· ·								
Community	Campus Landscape Architect				ļ				
					1				
Client	Client End User Stakeholders as Needed				1				
Other									

How to use this document: 1.In the UCSD Project Kickoff Meeting, the Design Team and UCSD Project Team shall fill out this Cover Page together, determining the responsible party for each of the Bluebeam-related project tasks in Section A, and the UCSD Departments reviewing the project in Section B. 2.Once the Sections are filled out, save the PDF. 3.In Bluebeam, open all submittal files requiring Reviewer comments. 4.Use the Document > Insert > Pages from Document... command in Bluebeam to insert this Cover Sheet before the first page in each of the submittal files. 5.Be sure to insert this completed Cover Page into submittal files prior to adding documents into the Bluebeam Studio Session.



### **Exhibit B Bluebeam Studio Account Setup**

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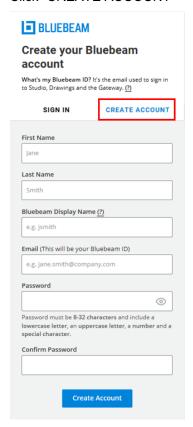
1.0	UCSD Department Identification: Names, Abbreviations, and Colors	1
2.0	New Bluebeam Studio Account: Setup & Sign In	2
3.0	New Bluebeam Studio Account: Preferences	3
4.0	Existing Bluebeam Studio Account: Setup & Sign In	4
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6.0	Install the UCSD Bluebeam Profile (UCSD Staff Only)	6
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### 1.0 UCSD Department Identification: Names, Abbreviations, and Colors

Color of Markups	Department	Abbre viation	Division(s) if applicable
CPM	Capital Program Management	СРМ	Project Manager
DDSE	Design and Development Services	DDSE	Engineering
DDSI Design and Development Services		DDSI	Inspector
DDSA Design and Development Services		DDSA	Architect
СРМС	Capital Program Management	СРМС	Contracts, Architecture
IRPC	Independent Plan Review Consultant	IPRC	
Access	Accessibility		
EH&S	Environmental Health & Safety	EH&S	
Fire Marshal		FM	
CD Client-Department		CD	
FE Medical Center		FE	UC Health or FE
FM Facilities Management/Engineering		FM	
Planner	Planner Project Planner		
PP	Physical Planning	PP	
PPE	Physical Planning - Environmental	PPE	
ITS	Information Technology Service	ITS	
AS/VS	Audio Visual Systems	AS/VS	
PK	Parking	PK	
PD/PS	PD/Security	PS/DS	
FM	Energy & Sustainability	ES	
RE	Real Estate	RE	
CxA	Commissioning	CxA	
HDH	Housing, Dining & Hospitality	HDH	

#### 2.0 New Bluebeam Studio Account: Setup & Sign In

- 2.1 Open Bluebeam
- 2.2 If License Agreement Window opens, click 'I Accept'
- 2.3 Locate and click the "Studio" button
- 2.4 Within the Studio tab click the "Sign In" button sign In sign In
- 2.5 Click "CREATE ACCOUNT"



- 2.6 Add First & Last name and email
- 2.7 Add Bluebeam Display Name
  - 2.7.1 UCSD staff, use: First Last

Example: John Smith

2.7.2 Design Teams, use: First Last – Company

Example: Mary Smith - AECOM

- 2.8 Create a password (Must be at least eight characters and include: uppercase, lowercase, number and special character)
- 2.9 Click "Create Account"
- 2.10 Click "I Accept" on Bluebeam Studio Terms of Use
- 2.11 The Bluebeam Studio account has now been created
- 2.12 Locate and open "Bluebeam Studio Welcome Email" from Outlook
- 2.13 Click "Validate Email"
- 2.14 Return to Bluebeam

#### 3.0 New Bluebeam Studio Account: Preferences

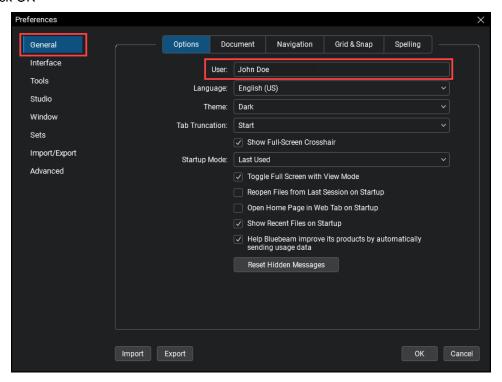
- 3.1 In the Revu drop-down menu (upper left), Click "Preferences" (or press Ctrl-K)
- 3.2 Go to "General" tab
- 3.3 Confirm name in "User" box
  - 3.3.1 UCSD staff, use: First Last

Example: John Smith

3.3.2 Design Teams, use: First Last – Company

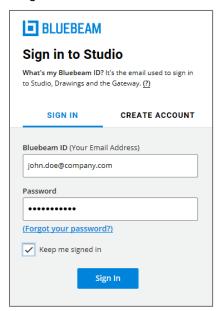
Example: Mary Smith - AECOM

#### 3.4 Click OK



#### 4.0 Existing Bluebeam Studio Account: Setup & Sign In

- 4.1 Open Bluebeam
- Look for the Studio button 4.2
- Inside the Studio Tab click the "Sign In" button
  Enter Bluebeam Studio Email and Password 4.3
- 4.4
- 4.5 Check "Keep me signed in"
- 4.6 Click "Sign In"



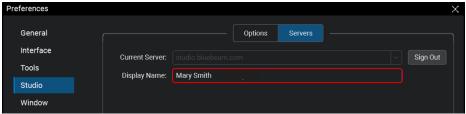
#### 5.0 Existing Bluebeam Studio Account: Preferences

- 5.1 In the Revu drop-down menu (upper left), Click "Preferences" (or press Ctrl-K)
- 5.2 Go to "Studio" tab
- 5.3 Click the 'Servers' button
- 5.4 In the Display Name area, check name for proper naming convention
  - 5.4.1 UCSD staff, use: First Last

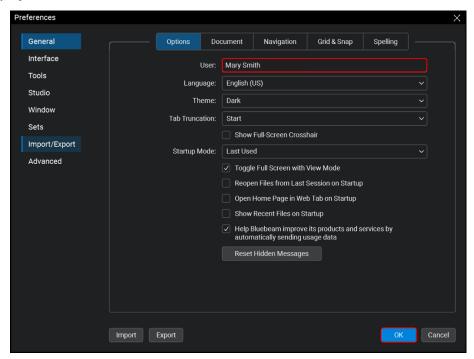
Example: John Smith

5.4.2 Design Teams, use: First Last – Company

Example: Mary Smith - AECOM

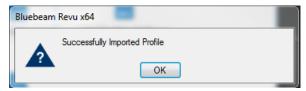


- 5.5 Go to "General" tab
- 5.6 Set Name in "User" box to match name set in "Display Name" box in Studio tab (defined in Section 5.4)
- 5.7 Click OK



#### 6.0 Install the UCSD Bluebeam Profile

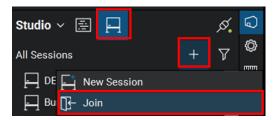
- 6.1 For experienced users that have predefined custom tools and/or profiles, verify that those customizations have been saved in the current profile. Tool customizations must be saved before loading another profile.
  - 6.1.1 Click the "Revu" drop-down menu
  - 6.1.2 Hover over "Profiles". Note the Profile that is checked, and click "Save Profile" in the submenu
- 6.2 Locate and load the UCSD Profile
  - 6.2.1 For UCSD Staff, the profile is in the Bluebeam support folder titled "Bluebeam Templates" on the UCSD Server, either in the Public network drive or other UCSD network drive
  - 6.2.2 In the subfolder titled "Profiles", locate and double-click the Bluebeam Profile Specific to the corresponding UCSD department. Bluebeam profiles contain a ".BPX" extension
- 6.3 Double-clicking the .bpx file will open Bluebeam and load the profile.



#### 7.0 Join Demo Bluebeam Studio Session to Verify Display Name

Note: The following procedures is a one-time process to verify the naming convention is correct.

- 7.1 In the Bluebeam Studio Panel, click the '+' sign
- 7.2 Select 'Join'
- 7.3 Enter Bluebeam Studio Session ID Number: \_\_\_\_ = \_\_\_ = \_\_\_



- 7.4 Make test comment using any markup tool
- 7.5 Verify that the name associated with the test comment is displayed correctly in the Markups List
  - 7.5.1 UCSD staff, use: First Last

Example: John Smith

7.5.2 Design Teams, use: First Last – Company

Example: Mary Smith - AECOM

- 7.6 If name is incorrect, go to Section 5.0 and follow instructions to correct Display Name and Username
- 7.7 If name is correct, leave session; setup has been verified.



### **Exhibit C1 Bluebeam Studio Project Folder Structure - Major Capital Program**

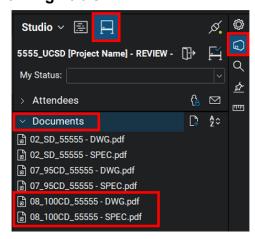
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	DJECT Naming Structure: Project # _UCSD Project Name
Studio PRC	DJECT Naming Example: 4444_UCSD Altman Research Institute
	SSION Naming Structure: Project # _UCSD Project Name - REVIEW
Studio SES	SSION Naming Example: 4444_UCSD Altman Research Institute - REVIEW
Studio SES	SSION Naming Example: 4444_UCSD Altman Research Institute - PKG2 REVIEW
	SSION Naming Example: 4444_UCSD Altman Research Institute - ADD2 REVIEW
	<u> </u>
UCSD EPR	
	oing Triage Documents
	ickoff Meeting
	schedule
3. U	ICSD Original As-Builts
	ign Team Submissions
1. S	
2. 50	0DD
3. 10	00DD
4. 50	0CD
5. 9	
	00CD
	Deferred Approvals
	Back Check Sets
	s-Built (As Applicable. Design Team will also submit directly into E-Builder)
	Record Documents (As Applicable. Design Team will also submit directly into E-Builder)
10. 1	Necord Documents (As Applicable, Design Team will also submit directly lifto E-builder)
0 1100	
	SD Approved Documents
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	00DD
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	00CD
	Deferred Approvals
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### **Exhibit C2 Bluebeam Studio Project Folder Structure - Minor Capital Program**

Studio PROJECT Naming Structure:	Project # _UCSD Project Name
Studio PROJECT Naming Example:	55555_UCSD Altman Bldg AC System Update
Studio SESSION Naming Structure:	Project # _UCSD Project Name - REVIEW
Studio SESSION Naming Example:	55555_UCSD Altman Bldg AC System Update - REVIEW
UCSD EPR	
A. Scoping Documents	
Kickoff Meeting	
2. Schedule	
UCSD Original As-Builts	
D D : T O ! : :	
B. Design Team Submissions	
1. SD	
2. 80CD	
3. 100CD	
4. As-Built Set 5. Record Document Set	
5. Record Document Set	
C. UCSD Approved Documents	
Approved Bid Set	
1. Approved Bid Get	
D. Archived Markup Documents	
1. SD	
2. 80CD	
3. 100CD	
30022	
E. Native Files	
1. SD	
2. 80CD	
3. 100CD	
4. As-Built Set	
5. Record Document Set	

### **Exhibit D: Document File Naming Table**



Note: Naming submittal files in accordance with this naming convention will bring the latest documents to the bottom of the "Documents" section in the Bluebeam Studio Session tab.

Latest Documents →

General File Naming Structure: [Phase Prefix]\_[Phase Name]\_[Project Number] - [Document Description]

File Naming Example - Major Cap: 08\_100CD\_44444 - DWG.pdf (08 Prefix, 100% CD, Project 4444, Drawing Set)

File Naming Example - Minor Cap: 08\_100CD\_55555 - DWG.pdf (08 Prefix, 100% CD, Project 55555, Drawing Set)

Submittal Phase Document Type Naming Convention Notes

Submittal Phase	Document Type	Naming Convention	No
RFP / PQ	UCSD RFP	01_4444 - RFP_DOC.pdf	
DOCS	UCSD PQ	01_4444 - PQ_DOC.pdf	
	Drawings	01_4444 - BRIDG_DWG.pdf	
BRIDGING	Basis of Design	01_4444 - BRIDG_BOD.pdf	
DOCS	Project Manuals	01_4444 - BRIDG_PROJ MAN.pdf	
	Reports	01_4444 - BRIDG_RPT.pdf	
	Drawings	01_4444 - FEAS_DWG.pdf	
EASIBILITY	Basis of Design	01_4444 - FEAS_BOD.pdf	
STUDIES	Project Manuals	01_4444 - FEAS_ PROJ MAN.pdf	
	Reports	01_4444 - FEAS_RPT.pdf	
DETAILED	Drawings	01_4444 - DPPD_DWG.pdf	
PROJECT	Scoping Docs	01_4444 - DPPD_SCOPE.pdf	
PROGRAM	Schedules	01_4444 - DPPD_SCHED.pdf	
DOCS	Reports	01_4444 - DPPD_RPT.pdf	
	Drawings	02_SD_4444 - DWG.pdf	
	Drawing Volumes	02_SD_4444 - DWG_VOL1.pdf	
	Revised Drawings	02_SD_4444 - DWG_R1.pdf	
	Specifications	02_SD_4444 - SPEC.pdf	
SD	Revised Specifications	02_SD_4444 - SPEC_R1.pdf	
SD	Calculations	02_SD_4444 - DD CALCS.pdf	
	Basis of Design	02_SD_4444 - BOD.pdf	
	Project Manuals	02_SD_4444 - PRJ MANS.pdf	
	Reports	02_SD_4444 - GEOTECH RPT.pdf	
	Cut Sheets	02_SD_4444 - CUT SHEETS.pdf	

	Drawings	03_50DD_4444 - DWG.pdf
	Drawing Volumes	03_50DD_4444 - DWG_VOL1.pdf
	Revised Drawings	03_50DD_4444 - DWG_R1.pdf
500/ 55	Specifications	03 50DD 4444 - SPEC.pdf
50% DD	Revised Specifications	03_50DD_4444 - SPEC_R1.pdf
If Ammliandala	Calculations	03_50DD_4444 - CALCS.pdf
If Applicable	Basis of Design	03_50DD_4444 - BOD.pdf
	Project Manuals	03_50DD_4444 - PRJ MANS.pdf
	Reports	03_50DD_4444 - GEOTECH RPT.pdf
	Cut Sheets	03_50DD_4444 - CUT SHEETS.pdf
	Drawings	04_100DD_4444 - DWG.pdf
	Drawing Volumes	04_100DD_4444 - DWG_VOL1.pdf
	Revised Drawings	04_100DD_4444 - DWG_R1.pdf
	Specifications	04_100DD_4444 - SPEC.pdf
100% DD	Revised Specifications	04_100DD_4444 - SPEC_R1.pdf
	Calculations	04_100DD_4444 - CALCS.pdf
	Basis of Design	04_100DD_4444 - BOD.pdf
	Project Manuals	04_100DD_4444 - PRJ MANS.pdf
	Reports	04_100DD_4444 - GEOTECH RPT.pdf
	Cut Sheets	04_100DD_4444 - CUT SHEETS.pdf
	•	·
	Drawings	05_50CD_4444 - DWG.pdf
	Drawing Volumes	05_50CD_4444 - DWG_VOL1.pdf
	Revised Drawings	05_50CD_4444 - DWG_R1.pdf
	Specifications	05_50CD_4444 - SPEC.pdf
50% CD	Revised Specifications	05_50CD_4444 - SPEC_R1.pdf
50% CD	Calculations	05_50CD_4444 - CALCS.pdf
	Basis of Design	05_50CD_4444 - BOD.pdf
	Project Manuals	05_50CD_4444 - PRJ MANS.pdf
	Reports	05_50CD_4444 - GEOTECH RPT.pdf
	Cut Sheets	05_50CD_4444 - CUT SHEETS.pdf
	•	· · · · · · · · · · · · · · · · · · ·
	Drawings	06_80CD_55555 - DWG.pdf
	Revised Drawings	06_80CD_55555 - DWG_R1.pdf
	Specifications	06_80CD_55555 - SPEC.pdf
80% CD	Revised Specifications	06_80CD_55555 - SPEC_R.pdf
00% CD	Calculations	06_80CD_55555 - CALCS.pdf
	Project Manuals	06_80CD_55555 - PRJ MANS.pdf
	Reports	06_80CD_55555 - GEOTECH RPT.pdf
	Cut Sheets	06_80CD_55555 - CUT SHEETS.pdf

	Drawings	07_95CD_4444 - DWG.pdf				
95% CD	Drawing Volumes	07_95CD_4444 - DWG_VOL1.pdf				
	Revised Drawings	07 95CD 4444 - DWG R1.pdf				
	Specifications	07 95CD 4444 - SPEC.pdf				
	Revised Specifications	07 95CD 4444 - SPEC R1.pdf				
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	Basis of Design	07 95CD 4444 - BOD.pdf				
	Project Manuals	07_95CD_4444 - PRJ MANS.pdf				
	Reports	07 95CD 4444 - GEOTECH RPT.pdf				
	Cut Sheets	07 95CD 4444 - CUT SHEETS.pdf				
	Drawings	08_100CD_4444 - DWG.pdf				
	Drawing Volumes	08_100CD_4444 - DWG_VOL1.pdf				
	Revised Drawings	08_100CD_4444 - DWG_R1.pdf				
	Specifications	08 100CD 4444 - SPEC.pdf				
Final 100% CD	Revised Specifications	08_100CD_4444 - SPEC_R1.pdf				
	Calculations	08_100CD_4444 - CALCS.pdf				
	Basis of Design	08 100CD 4444 - BOD.pdf				
	Project Manuals	08_100CD_4444 - PRJ MANS.pdf				
	Reports	08_100CD_4444 - GEOTECH RPT.pdf				
	Cut Sheets	08_100CD_4444 - CUT SHEETS.pdf				
	Drawings	09_DA_4444 - DWG.pdf				
	Revised Drawings	09_DA_4444 - DWG_R1.pdf				
	Specifications	09_DA_4444 - SPEC.pdf				
5.6	Revised Specifications	09 DA 4444 - SPEC_R1.pdf				
Deferred	Calculations	09_DA_4444 - CALCS.pdf				
Approvals	Basis of Design	09_DA_4444 - BOD.pdf				
	Project Manuals	09_DA_4444 - PRJ MANS.pdf				
	Reports	09_DA_4444 - GEOTECH RPT.pdf				
	Cut Sheets	09_DA_4444 - CUT SHEETS.pdf				
	Drawings	10_BC_4444 - DWG.pdf				
	Revised Drawings	10_BC_4444 - DWG_R1.pdf				
Back Check	Specifications	10_BC_4444 - SPEC.pdf				
	Revised Specifications	10_BC_4444 - SPEC_R1.pdf				
	Calculations	10_BC_4444 - CALCS.pdf				
	Basis of Design	10_BC_4444 - BOD.pdf				
	Project Manuals	10_BC_4444 - PRJ MANS.pdf				
	Reports	10_BC_4444 - GEOTECH RPT.pdf				
	Cut Sheets	10_BC_4444 - CUT SHEETS.pdf				

<sup>\*</sup>Drawing Files larger than 1 GB need to be broken into volume



#### **Exhibit E Email Templates**

#### 1.0 Template 1 – Design Team Invitation to Bluebeam Studio Project

1.1 Copy-and-paste into an email to introduce Teams to the UCSD Electronic Plan Review (EPR) process. Include the Bluebeam Studio Project invite if available – for the Design Team to join the Bluebeam Studio Project and submit documents.

Email Subject: Welcome to UCSD Electronic Plan Review (EPR)

Dear Design Team,

Thank you for partaking in the UCSD Electronic Plan Review (EPR) process. This email contains EPR instructions to guide you through the process.

Step 1: Review the attached documents:

- 1. Electronic Plan Review Procedure Design Team
- 2. Exhibit D: Document Naming Table for Submissions
- 3. UCSD EPR Cover Sheet
- 4. UCSD Bluebeam Profile

These documents contain instructions on how to set up Bluebeam Studio account names, proper naming & formatting of the PDF submission using Bluebeam software, and how to upload documents to Bluebeam Studio Project. It also outlines steps for responding to UCSD Reviewer comments within a Bluebeam Studio Session.

**Step 2:** Create the PDF Drawings, Specs and supporting documents. Follow the instructions in the UCSD EPR Design Team Procedure to properly format the PDFs using Bluebeam software. Document formatting includes:

- 1. PDFs properly named per Exhibit D
- 2. Sheet Count in Sheet Index matches Bluebeam sheet count
- Title Block contains blank Stamp Area in same location on every page
- Individual file sizes less than 1GB
- 5. All drawing pages of all Trades combined & submitted as Single PDF
- 6. Bluebeam Drawing Bookmarks created using "Page Number Sheet Name" formatting
- 7. Bluebeam Specification Bookmarks created using "Section Title" formatting
- 8. Bookmarks are Nested
- 9. Page Labels appear in Thumbnails
- 10. Hyperlinks created
- 11. Page Scales applied to Architectural Floor Plans
- 12. Lavers are Removed
- 13. Document is Flattened

**Step 3:** As determined in the Project kickoff meeting, determine party responsible for creation of the Bluebeam Studio Project and Bluebeam Studio Session (either UCSD or the Design Team). Once the files are created and properly formatted, submit to UCSD using the Bluebeam Studio Project.

**Step 4:** Once the Plans and supporting files have been submitted / uploaded to Bluebeam Studio Project, notify UCSD of the submission. UCSD will begin the review process in a Bluebeam Studio Session.

**Step 5:** After initial UCSD review is complete, the Design Team will be invited to view the comments within the Bluebeam Studio Session.

Note: Most steps above require the Design Team to have at least one license of Bluebeam Software. For most submission sets the Design Team will need to use the eXtreme Version of Bluebeam software.



#### 2.0 Template 2 - Improperly Formatted PDF Document (Rejection Email)

- 2.1 When incorrectly formatted submittals are received, copy & paste the following information to notify the Design Team that the documents need to be resubmitted
- 2.2 Place and "X" in the table below to indicate non-compliance(s) found

Email Subject: Improperly Formatted PDF Document Submittal for UCSD Project [project name]

Dear Design Team,

UCSD received an electronic submittal for the above referenced project; however, the submittal was not formatted as required (per the UCSD Electronic Plan Review Procedure for the Design Team). The incorrectly formatted documents shall be resubmitted, and UCSD shall be notified of the resubmittal.

#### **VALIDATION OF DOCUMENT PREPARATION**

# X = Non-Compliance with Procedure. Revise Document(s) to address specific non-compliance item NR = Not Required

SUBJECT		"X" = NOT COMPLETED PROPERLY			
Document Preparation step:	DWG	SPECS	Supporting Documents	Action Required	
PDFs properly named per Exhibit D					
Sheet Count on sheet index to match Bluebeam sheet count		NR	NR		
Title Block Stamp Area		NR	NR		
File size less than 1GB					
Single PDF created of all Drawing pages					
Bookmarks created with Page Number and Sheet Name (drawings), or Section Title (Specs)					
Bookmarks nested		NR	NR		
Page Labels appear in thumbnail?		NR	NR		
Hyperlinks created		NR	NR		
Page Scales added to Arch Floor Plans					
Layers removed		NR	NR		
Document Flattened					

Notify UCSD via email once the revised files have been resubmitted to Bluebeam Studio Project.



### Exhibit F- Bluebeam Studio Tips and Tricks

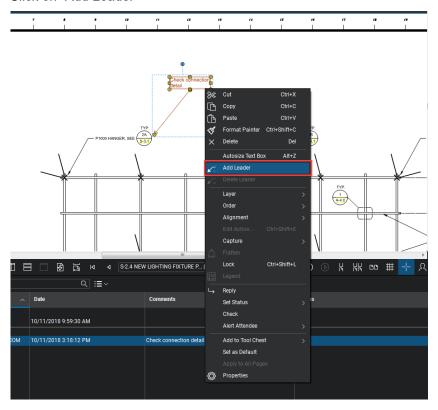
i abie c	ortents	1
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2.0	Delete a Leader from a Callout	1
3.0	Change Cloud Shape with Control Points	2
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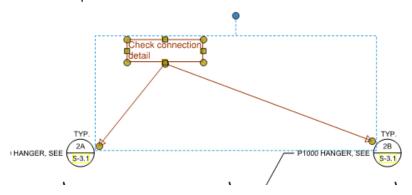
#### **Section A: Tips for Reviewers**

#### 1.0 Add a Leader to a Callout

- 1.1 Right-click on the callout
- 1.2 Click on "Add Leader"



1.3 Left-click to position additional leader



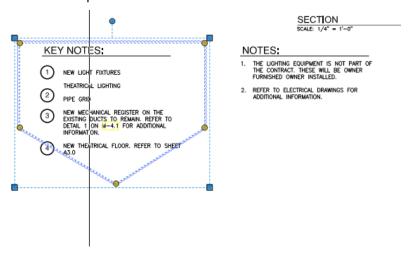
#### 2.0 Delete a Leader from a Callout

- 2.1 Select the Callout
- 2.2 Hold your Shift Key down
- 2.3 Pick on the yellow grip at the tip of the leader you want removed.



#### 3.0 Change Cloud Shape with Control Points

- 3.1 Select comment shape
- 3.2 Hold your Shift Key down
- 3.3 Pick a spot within any segment of the shape, the control point will be added.
- 3.4 Move control point to desired location



3.5 If required you can also right click on a line segment and select "Convert to Arc" to make round edges.

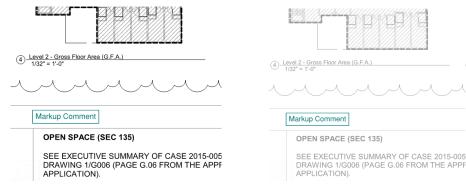
#### 4.0 Delete Control Points within a Markup Cloud

- 4.1 Select cloud
- 4.2 Hold your Shift Key down
- 4.3 Pick on the control point you want to remove

#### 5.0 Locate Comments Quickly using the Dimmer

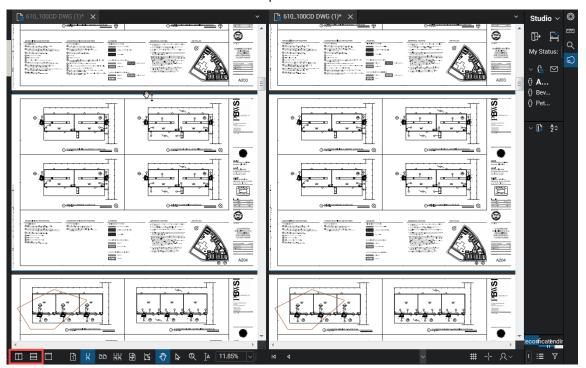
Note: The Dimmer command can also be found in the "View" pull-down menu, or by pressing Ctrl-F5

5.1 The Dimmer button fades the drawing contents to allow comments to be seen easier.



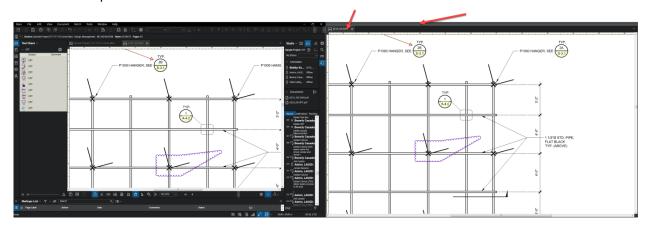
#### 6.0 Split the Screen to Compare Two Documents

- 6.1 Open two documents for review
- 6.2 In bottom left corner of Bluebeam document window, click a split screen button. Split screen buttons include both Vertical split and Horizontal split
- 6.3 A second Bluebeam document window will open



#### 7.0 Using Multiple Monitors to Compare Two Documents

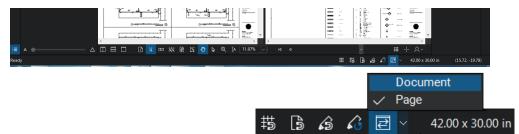
- 7.1 Open documents for review
- 7.2 To drag a window to a second monitor, click the document tab at the top and drag
- 7.3 Hold and drag to second monitor
- 7.4 Double-click top of new window to make full screen





#### 8.0 Syncing Views on Split Screen Documents

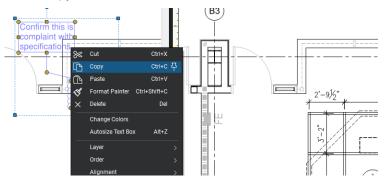
- 8.1 Select previous phase document
- 8.2 In bottom right corner of Bluebeam document window click Sync dropdown arrow
- 8.3 Check Page or Document
  - 8.3.1 Page will sync the movements of the current page being viewed
  - 8.3.2 Document will sync the movements of the current page and will also sync page turns of documents
  - 8.3.3 If sheets have been added in the new set this feature will not work



#### 9.0 Forwarding Comments – into a Revised Submittal

Note: If comment has not been incorporated by the Design Team in the subsequent submittal

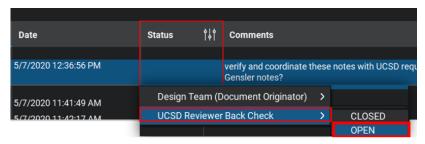
- 9.1 Highlight comment in the bottom markup list
- 9.2 Right-click comment on document above
- 9.3 Select copy



- 9.4 Select subsequent submittal document window
- 9.5 Paste Option 1: Right-click document where comment will be placed. Select paste
- 9.6 Paste Option 2: Press Ctrl-Shift-V. Markup will paste in exact same location from old to new page.
- 9.7 Paste Option 3: Click "Paste in Place" button from old to new page.
- 9.8 Edit FORWARDED comment as needed
- 9.9 Return to previous submittal
- 9.10 Go to status column
- 9.11 Double left-click highlighted area



- 9.12 Use the UCSD REVIEWER Menu
- 9.13 Select OPEN

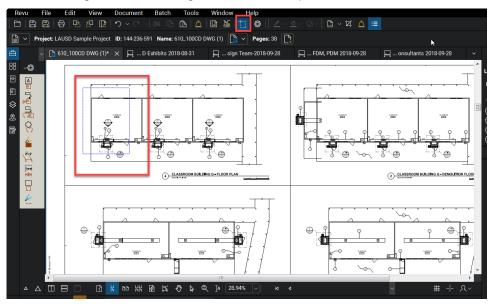


#### 10.0 Snapshot Tool - to Copy an Area of the Page

10.1 Select Snapshot tool from the top tool bar

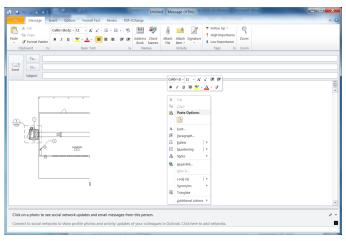


10.2 Click and drag to create rectangular area to be copied



10.3 Selected area will be outlined in blue

10.4 Snapshots can be pasted back into Bluebeam or into other programs (Excel, Word, Outlook, etc.)



10.5 Paste the snapshot into the program and/or document

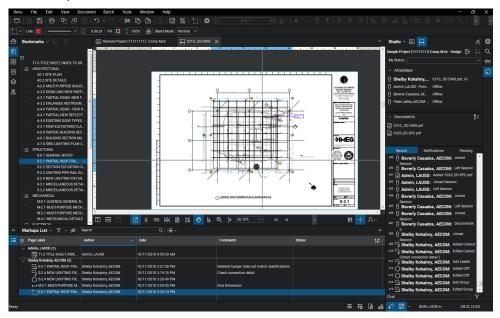
Note: Pasted snapshots will maintain the original scale and may need to be reduced in size

10.6 Click and drag from any corner to reduce size

#### 11.0 Change the Color of a Pasted Snapshot

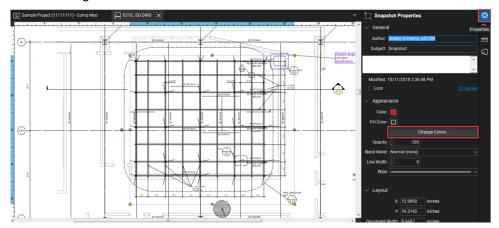
Note: See <u>Snapshot Tool</u> to first create a Snapshot. The color of the Snapshot can be changed to contrast against the page

11.1 Paste snapshot to desired location in document

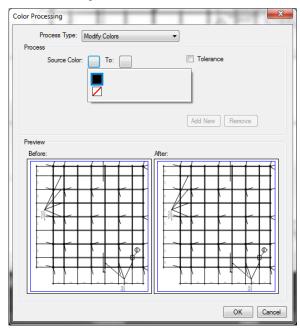


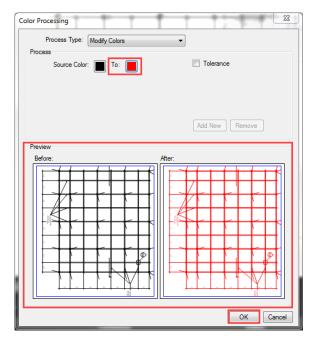
11.2 Resize as needed

- 11.3 Click properties tab
- 11.4 Select Change Colors



- 11.5 Color Processing Window will open
- 11.6 Select Source Color: (typically Black)
- 11.7 This is the original color of the text

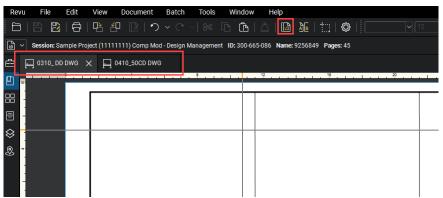




- 11.8 Select "To:" Color (Example: Red)
- 11.9 Confirm color change in Preview
- 11.10 Click OK

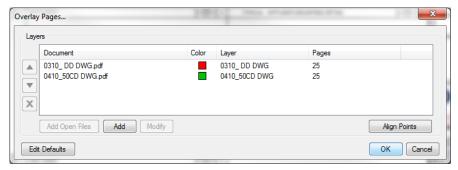
#### 12.0 Page Overlay - for Original vs. Revised Page(s) Comparison

- 12.1 Open both documents to be overlaid
- 12.2 Click Overlay Pages button , or select Overlay Pages from Document pull-down menu

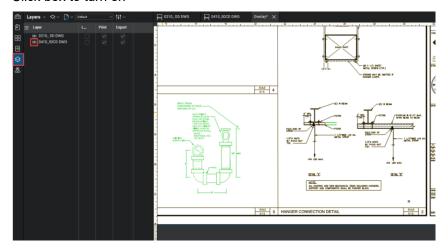


12.3 Overlay Pages window will open

- 12.4 Double-click either document to change parameters ex. change pages option: All Pages, Current Page, or Custom Range, custom color for Page, etc.
- 12.5 Click OK to save parameter changes



- 12.6 A new PDF document will be created labeled Overlay, each document overlaid is now a separate layer
- 12.7 To turn layers on and off go to layers tab
- 12.8 Click eye image in box to turn off
- 12.9 Click box to turn on

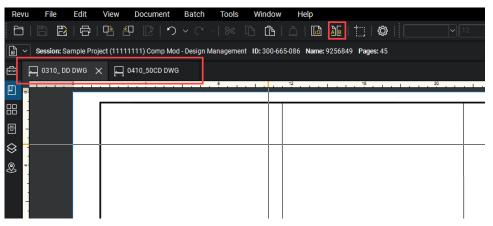




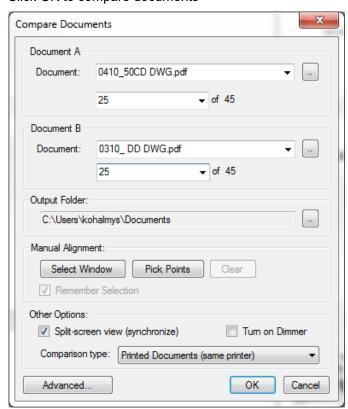
#### 13.0 Document Comparison – to Compare entire Documents

Note: Document comparison will only function if the Revised Document has the exact number of pages in the exact order. Page Overlay is the recommended way to compare document pages.

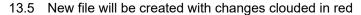
- 13.1 Open both documents to be compared
- 13.2 Select Compare Documents tool from top tool bar

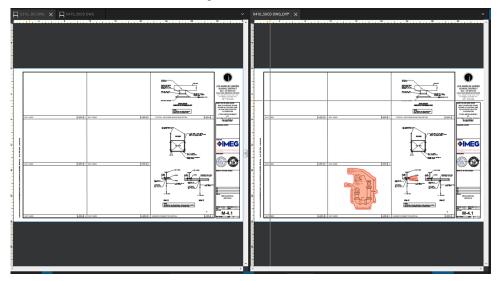


- 13.3 Compare Documents window will open
  - 13.3.1 Note: Documents must have same page range to be compared
  - 13.3.2 Ensure Document A is the new phase
  - 13.3.3 Ensure Document B is the previous
- 13.4 Click OK to compare documents





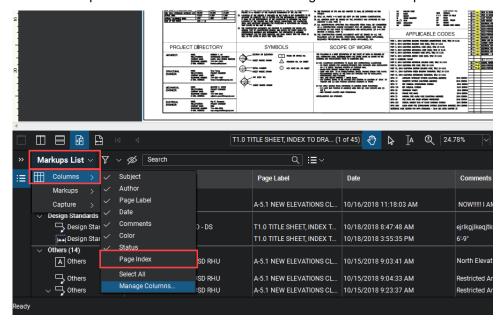




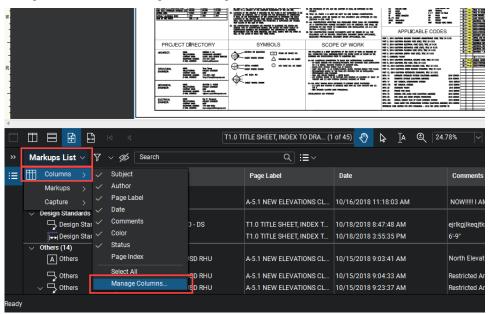
#### 14.0 Page Index - to Sort Pages in Markups List

Note: Adding the Page Index column in the Markups List will sort pages in the order they appear in the drawing set.

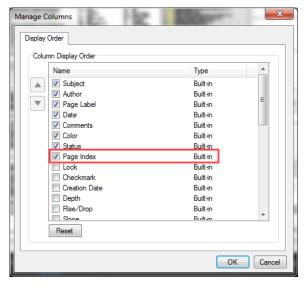
14.1 Select Markups List > Select Columns > Select Page Index from drop down



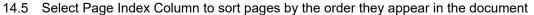
14.2 If Page Index is not listed go to Manage Columns

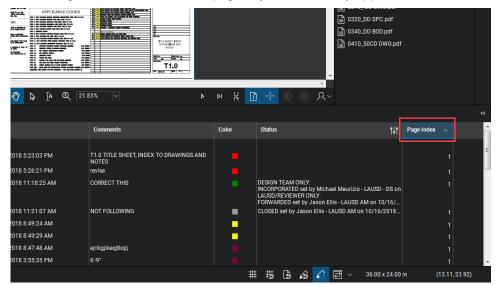


14.3 In the Manage Columns window, check Page Index



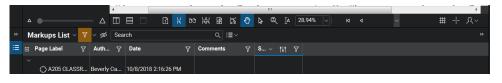
14.4 Click OK





#### 15.0 Use Filters to Sort and Refine Markup Comments

- 15.1 Standard Filters
- 15.2 Click Filter tab
- 15.3 Select column to filter



- 15.4 Select funnel filter to choose filter topic
- 15.5 Custom Filters
- 15.6 Click Filter tab
- 15.7 Select column to filter
- 15.8 Select drop down
- 15.9 Select "Custom"
- 15.10 Select Subject and choose search qualifier, ie equals, contains, ends with
- 15.11 Select search phrase
- 15.12 Select AND or OR to expand or restrict custom filter search
- 15.13 Select OK



#### 16.0 Using the "My Tools" Toolset & Keyboard Shortcuts

The My Tools Toolset (at the top of the Tool Chest) has two big uses: storing a customized note, and creating a keyboard shortcut for frequently used markups



- 16.1 Adding a markup to My Tools
  - 16.1.1 Click and drag a tool from the page or another toolbar into My Tools
  - 16.1.2 Right-click on an existing markup (on the page) and select "Add to Tool Chest", and select the My Tools Toolset.
- 16.2 Customizing My Tools
  - 16.2.1 Double-click the tool in My Tools to change it between Properties mode and Drawing mode.

Note: Markups in the Tool Chest can function in two different modes. Drawing mode creates an exact copy of the tool added to the Tool Chest (ex. a commonly-used text note added on multiple projects). Properties mode will create a new markup using the same visual properties of the original markup (ex. to create a keyboard shortcut to a commonly-use markup, like a callout).

- 16.3 My Tools Keyboard Shortcuts
  - 16.3.1 When a tool is added to My Tools, it will automatically be assigned a keyboard shortcut number. Simply type that number (no enter or spacebar, just the number) to activate that tool going forward.

#### 17.0 Setting Temporary Scale of a Drawing Page for Dimensioning while in a Session

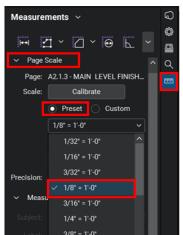
Note: Use this command to set a temporary Scale prior to any measurements of a drawing.

- 17.1 Locate the Floor Plans
- 17.2 Verify a scale is listed in the title of the Floor Plan on the Sheet



- 17.3 Within the "Measurements" panel Docate the Page Scale section
- 17.4 Set Precision to 1/2

17.5 Select the scale from the "Preset" Scales



Note: Once the scale has been selected for a page, that scale is temporarily stored in the page. After closing the file the scale will need to be reset.

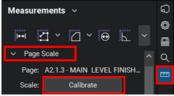
17.6 To determine if page scales have been applied on pages, go to the Thumbnails. Check "Page Scale" in the Thumbnail Label Options to view page scales.



#### 18.0 Calibrating Drawing Pages that have an Unknown Scale

Note: To use the Calibrate command there must be a known dimension on the page to reference. Use this command to set a Scale prior to any measurements of a drawing.

- 18.1 Locate page to calibrate
- 18.2 Within the "Measurements" panel | locate the Page Scale section
- 18.3 Set Precision to 1/2
- 18.4 Click the "Calibrate" button

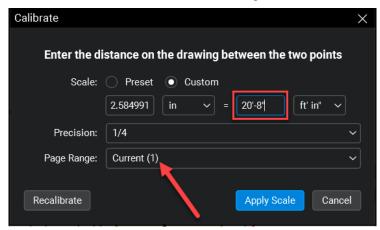


Note: the Calibrate button works by selecting two points, and then entering the known distance between the two points. This sets a scale.

18.5 Locate a dimension or bar scale on the drawing. Select two points that are a known distance apart



18.6 Enter the dimension known on the drawing. This will set a scale on the sheet.



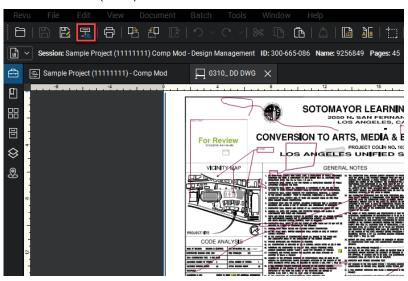


#### Section B: Tips for Administrators & Support Staff

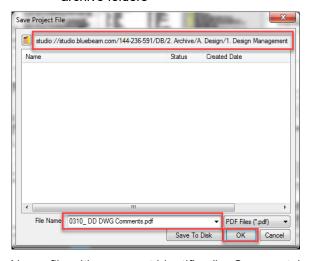
#### 19.0 Archive Session Files & Comments: Copying Session Files to the Studio Project

Note: This method copies files, including all markup comments, from the Bluebeam Studio Project to the Bluebeam Studio Session.

- 19.1 Join Session
- 19.2 Open Session document to be archived
- 19.3 Select Save AS (DMS) Icon



- 19.4 Save Project File window will open
- 19.5 Open to 2. Archive > Design > Design Management folder (Double-click parent folder to expand)
  - 19.5.1 Note: UCSD Version 1 and UCSD Approved files should be loaded to their respective archive folders



- 19.6 Name file with comment identifier (i.e Comments)
- 19.7 Click OK to save file to project folder

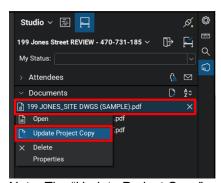


#### 20.0 Archive Session Files & Comments: Copying Session Files / Overwriting Project Files

Note: This Section applies only to in a <u>Linked</u> Studio Project. A "Linked" Bluebeam Studio Project indicates a Studio Project where the files were added <u>directly</u> from the Studio Project to the Studio Session (right-click, add to new/existing Studio Session). The Bluebeam Studio Project and Bluebeam Studio Session <u>must be linked</u> in order to "update" from Session to Project.

Using this method will OVERWRITE THE ORIGINAL STUDIO PROJECT FILES. If the intention is not to overwrite the original files, or if the Session and Project are not linked together, refer to the previous Section, titled "Copying Session Documents to the Studio Project". Also note that while Copying Session documents (described in the previous Section) is the preferred method, the method described in this Section is the faster method – because documents do not have to be opened before updating back to the Bluebeam Studio Project.

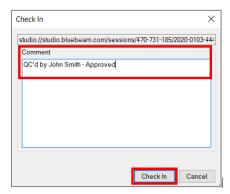
- 20.1 Join the Bluebeam Session
- 20.2 Identify the Session files to be
- 20.3 Copy the Session files back to the Studio Project
  - 20.3.1 Once QC is complete for each approved document: right click the file in the "Documents" area of the Session and select "Update Project Copy"



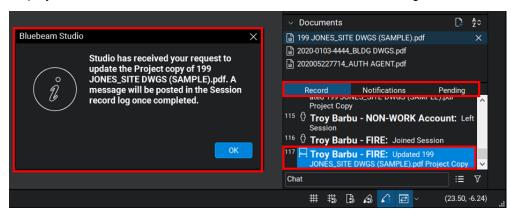
Note: The "Update Project Copy" command copies the file (including all markups) from the Session and replaces (updates) the copy of the file in the Bluebeam Project. Bluebeam Project has the ability to restore previous versions, so the original version of the file can be recovered if needed.

If the "Update Project Copy" option is not displayed when right-clicking the file, check the permissions of the studio account. Account email must have "Full Control" permisson allowed.

20.3.2 Add a comment (optional) and Check In the document



- 20.3.3 After clicking "Update Project Copy", Studio will display a message regarding updating the file located in Bluebeam Project
- 20.3.4 Once the file in Bluebeam Project is updated (may take several minutes), a notification is displayed at the bottom of the "Record" section within the Session log



- 20.4 Join the Bluebeam Project
- 20.5 Locate the updated files

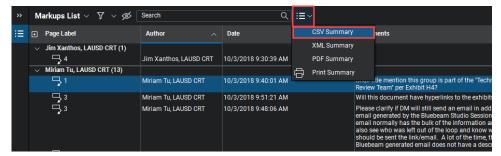
Note: To verify the Project file has been updated, right-click the file and select "Revision History". The latest version will be at the top of the list. Verify Date of Check In or comment.



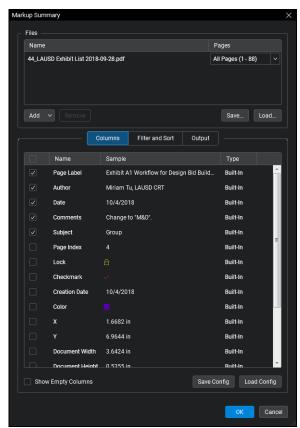
Note: Previous versions of the document can be recovered using the Revision History dialog

### 21.0 Archive comments as an editable report table in Excel

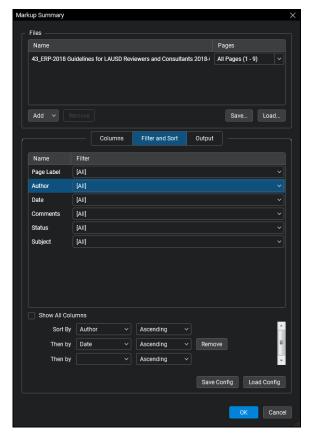
- 21.1 Filter as required, see Exhibit F1 for filtering
- 21.2 Click Summary Icon > Select CSV Summary from drop-down







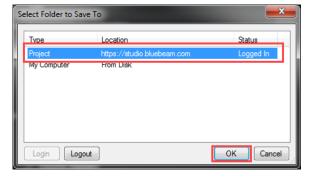
21.4 Click the Filter and Sort Tab > Confirm filtering as desired, if additional filtering is required do so at this time



- 21.5 Export to the Bluebeam Studio Project
- 21.6 Select browse button next to export

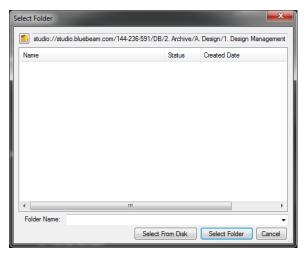


21.7 Select Folder to Save To window will open

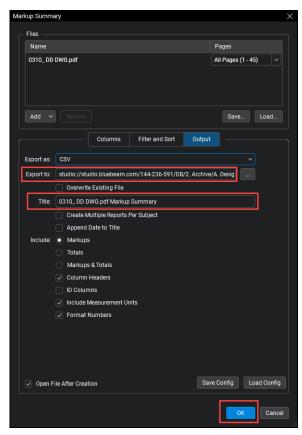


21.8 Select Project > Click OK

- 21.9 Select Project Folder to save to 2. Archive > Design > Design Management folder (Doubleclick parent folder to expand)
  - 21.9.1 Note: UCSD Version 1 and UCSD Approved files should be loaded to their respective archive folders

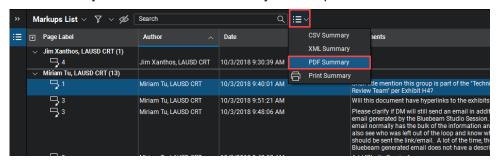


- 21.10 Click Select Folder
- 21.11 Title Document as required
- 21.12 Click OK

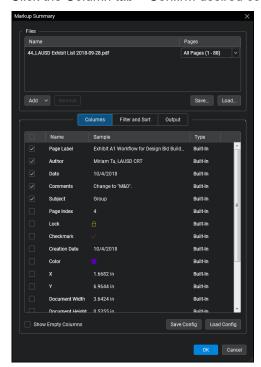


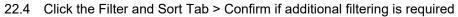
### 22.0 Archive comments as a PDF report

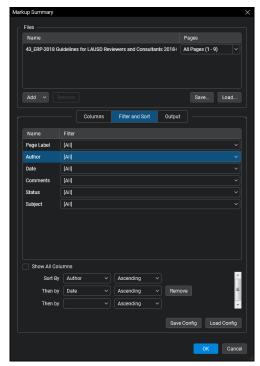
- 22.1 Filter markups as required
- 22.2 Click Summary Icon > Select PDF Summary from drop-down



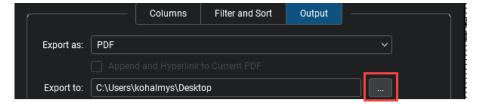
22.3 Click the Column tab > Confirm desired columns are selected



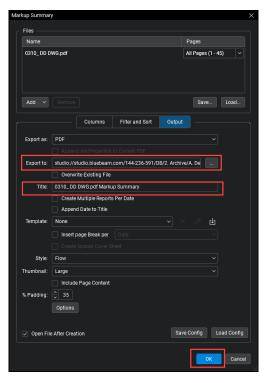




- 22.5 Export to the Bluebeam Studio Project
- 22.6 Select browse button next to export

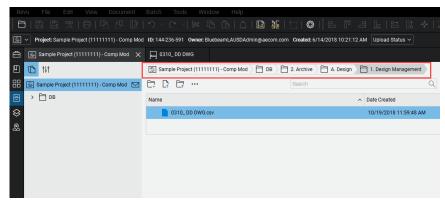


- 22.7 Select Folder to Save To window will open. Output can be exported to the Bluebeam Project or to a local drive
- 22.8 Title Document as required
- 22.9 Click OK

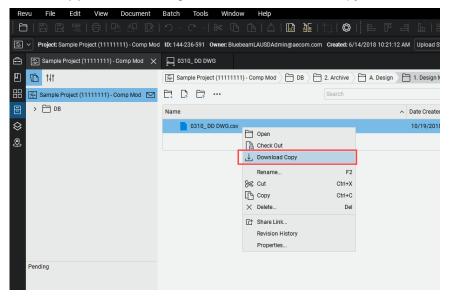


#### 23.0 Archive documents to Local Drive

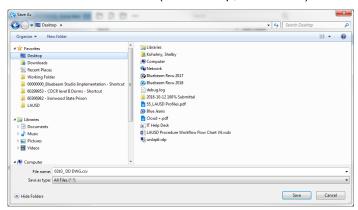
- 23.1 Join Bluebeam Studio Project
- 23.2 Go to Archive > Design > Applicable archive folder



23.3 Select file(s) for download, right-click, select download copy

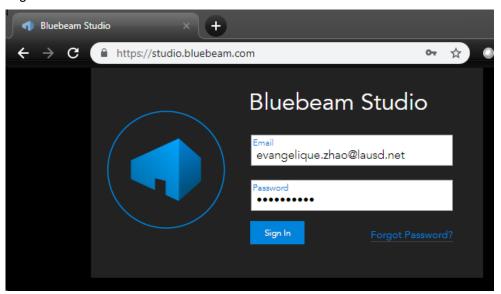


23.4 Select location to save to (i.e. Desktop, downloads) and click Save.

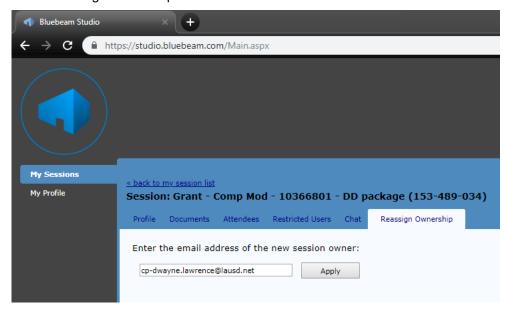


### 24.0 Change Session Ownership

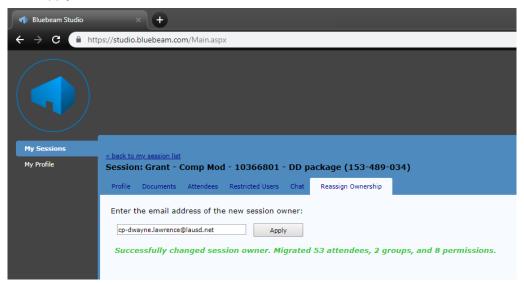
- 24.1 Go to studio.bluebeam.com
- 24.2 Login with Bluebeam Studio credentials



- 24.3 Select Session from list under My Sessions tab
- 24.4 Select Reassign Ownership tab



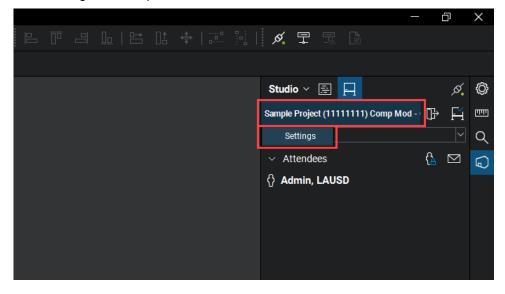
- 24.5 Enter email from new session owner
- 24.6 Click Apply



- 24.7 Ownership is now transferred permanently, and the session are removed from 'My Sessions' list
- 24.8 Bluebeam Projects can also be transferred using the same procedure.

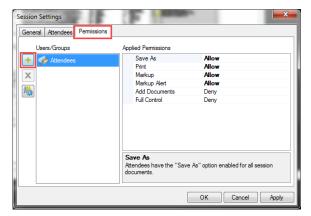
### 25.0 Grant Full Permission for Session

- 25.1 Select Session from Session list
- 25.2 Select Session name
- 25.3 Click Settings from drop-down menu



### 25.4 Go the Permissions Tab

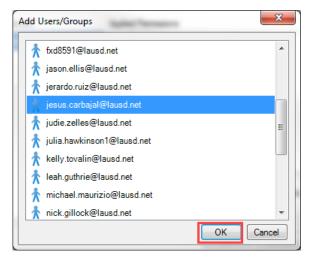
### 25.5 Click Green Plus Icon



25.6 Add Users/Groups window will open

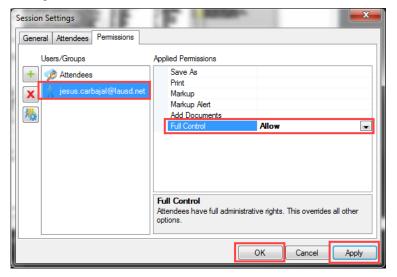
Note: Person requiring full permission must have attended the session previously

25.7 Select User from list



25.8 Click OK

25.9 Change Full Control for select name to Allow

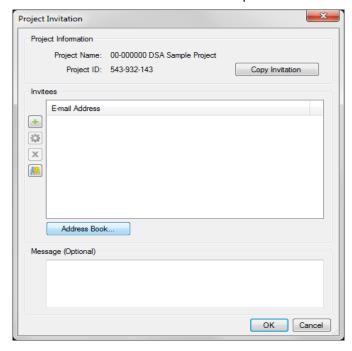


25.10 Click Apply 25.11 Click OK

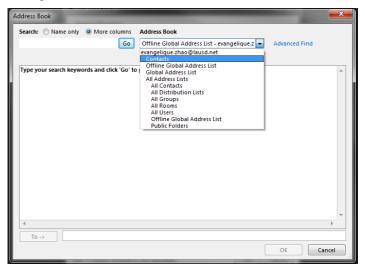
### 26.0 Studio Invite Groups

Note: An outlook invite group can be used to invite a group of people to a Bluebeam Studio Project to save time

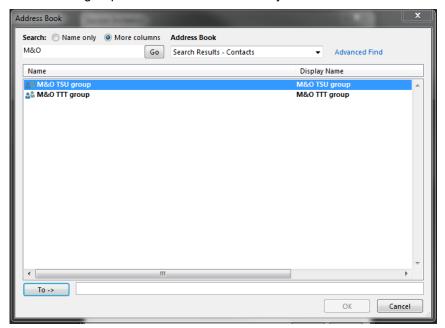
26.1 Open Bluebeam and select project or session where contact group will need session invite and select invite icon invitation screen will open select from Address book

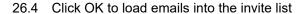


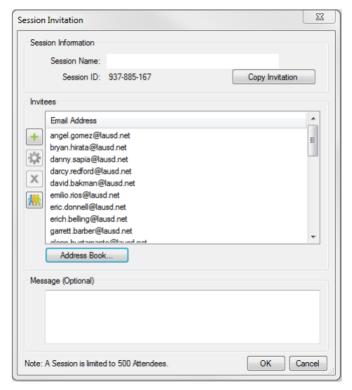
26.2 Changes browse location to local contacts list



26.3 Select invite group to add click To→ click okay list will add to invite screen







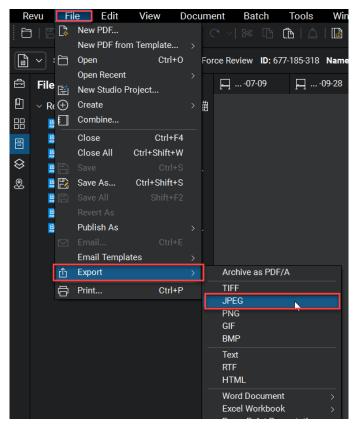
26.5 Click OK to send invite.

### 27.0 Scanned Document Prep

NOTE: Scanned documents are slow to regenerate in Bluebeam; therefore, all scanned documents are required to go through the preparation section. It is not recommended to work with scanned image copies of huge drawings as it can cause rendering issues.

- 27.1 Open the scanned PDF file
- 27.2 Export file to JPEG Go the File Menu (located at the top of the Bluebeam screen)

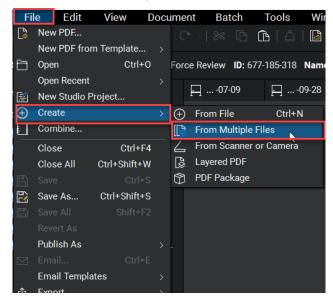
- 27.3 Go to Export at bottom of menu
- 27.4 Select JPEG



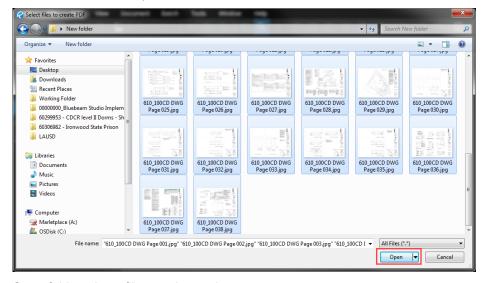
- 27.5 Browser window will open
- 27.6 Select New Folder
- 27.7 Double left-click on the New Folder to open
- 27.8 Select Save

### 28.0 Image files to PDF:

28.1 Select Create from drop-down menu

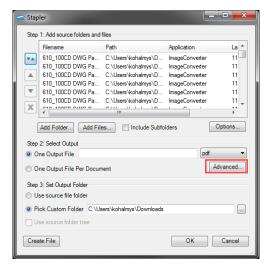


- 28.2 Select from Multiple files
- 28.3 Browser window will open

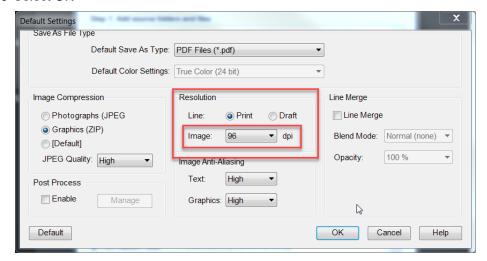


- 28.4 Go to folder where files are located
- 28.5 Select image files you want to use
- 28.6 Select Open

- 28.7 Stapler dialog will open
- 28.8 Select 'Advanced...' Button

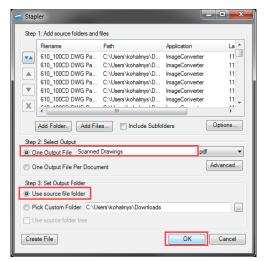


- 28.9 Select 96 dpi from the resolution image drop down
- 28.10 Select OK



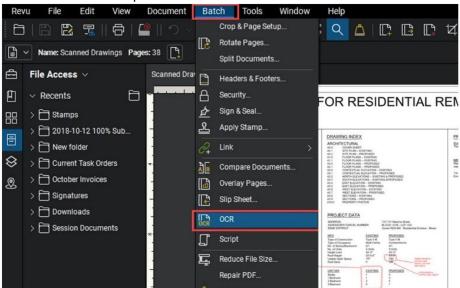
28.11 Add a file name to the 'One Output File' field

28.12 Select Use source file folder



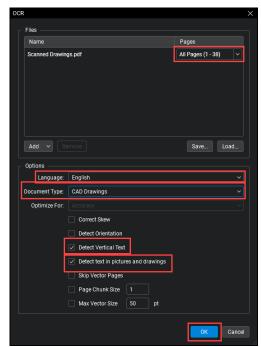
- 28.13 Click OK
- 28.14 Run Optical Character Recognition on Scanned PDF files
- 28.15 Go to Batch menu

NOTE: this Section requires Bluebeam eXtreme software version



- 28.16 Select OCR from the menu
- 28.17 Confirm all pages of open file
- 28.18 Set Language

- 28.19 Set Document Type to CAD Drawings
- 28.20 Check Detect Vertical Text
- 28.21 Check Detect text in pictures and drawings



28.22 Uncheck all other options & click OK



### **Exhibit G - Troubleshooting in Bluebeam**

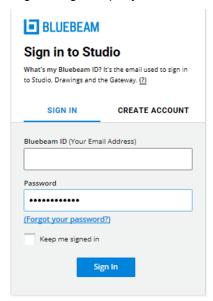
<b>Table</b>	of Contents	1
1.0	Login Errors	1
	1.1 IF - a new Bluebeam Studio account has been created and email-verified	1
	1.2 IF - Forgot Password, email or password provided is incorrect	2
	1.3 IF - Other Errors, the email or password provided is incorrect	2
2.0	Incorrect Naming Convention	3
	2.1 Correct the Display Name online in a web browser	3
3.0	Change Default Open / Save Location (Bluebeam Projects vs. Local Drives)	4
	3.1 Set default location to either a Bluebeam Studio Project or to a local computer drive	4
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	4.1 Report an issue to Bluebeam (Email)	5
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### 1.0 Login Errors

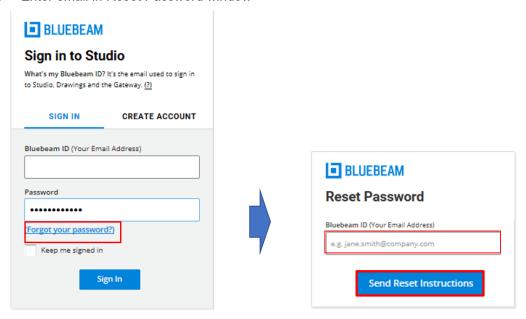
- 1.1 IF a new Bluebeam Studio account has been created and email-verified
  - 1.1.1 Click the Down Arrow next to the word "Studio" at the top of the Bluebeam Studio tab, or click the "Sign In" button in the center of the Bluebeam Studio tab



- 1.1.2 Click "Sign in" on Bluebeam Studio tab
- 1.1.3 Login using Company email



- 1.2 IF Forgot Password, email or password provided is incorrect
  - 1.2.1 Follow steps found in sections 1.1.1 and 1.1.2
  - 1.2.2 Click "forgot your password" at Bluebeam Sign in page
  - 1.2.3 Enter email in Reset Password window

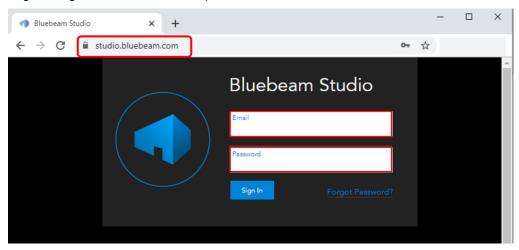


- 1.2.4 Follow emailed instructions (Email is from Bluebeam, if it does not appear in in inbox, check spam or other folders)
- 1.3 IF Other Errors, the email or password provided is incorrect
  - 1.3.1 Confirm email and password were entered properly
  - 1.3.2 Clicked forgot password no email received
  - 1.3.3 Confirm email was entered properly
  - 1.3.4 Check spam folder in email
  - 1.3.5 Account may not exist

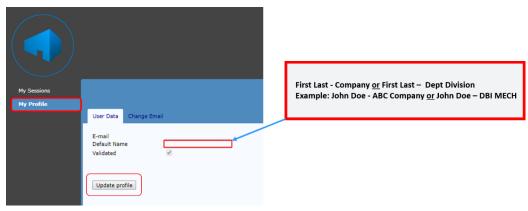
### 2.0 Incorrect Naming Convention

After logging into a Bluebeam Studio Session, the user's Display Name in the "Attendees" section within the Studio Session is incorrect

- 2.1 Correct the Display Name online in a web browser
  - 2.1.1 In web browser, go to: studio.bluebeam.com
  - 2.1.2 Login using Bluebeam email and password



- 2.1.3 Go to "My Profile" on the left side of the page
- 2.1.4 Update Default Name: First Last Company or First Last Dept Division
- 2.1.5 Example: John Doe ABC Company or John Doe DBI MECH

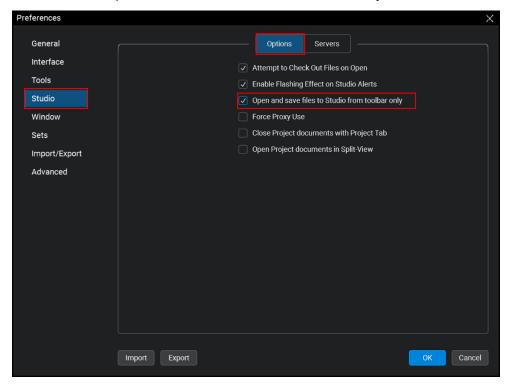


- 2.1.6 Click Update Profile
- 2.1.7 Return to Bluebeam Software
- 2.1.8 Log out & Log in again to Studio



### 3.0 Change Default Open / Save Location (Bluebeam Projects vs. Local Drives)

- 3.1 Set default location to either a Bluebeam Studio Project or to a local computer drive
  - 3.1.1 Go to Revu menu > Preferences
  - 3.1.2 In the preferences window on the left-hand side bar, go to Studio
  - 3.1.3 Select Studio
  - 3.1.4 Check the box "Open and save files to Studio from toolbar only" to default-save to Drives



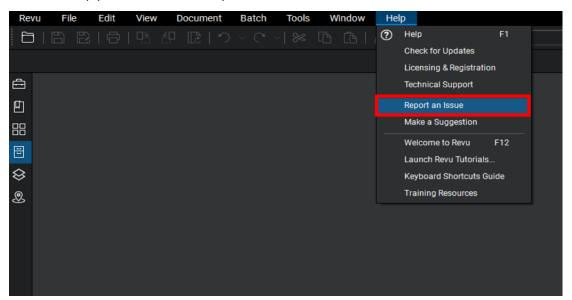
3.1.5 Click "OK"

### 4.0 Send Bluebeam Studio Support Ticket

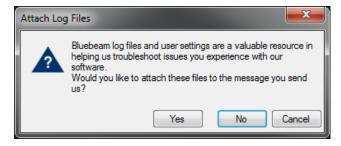
- 4.1 Report an issue to Bluebeam (Email)
  - 4.1.1 Send an email to support@bluebeam.com
  - 4.1.2 Describe the problem, including any error messages received
  - 4.1.3 Attach a screenshot of the errors or screen if possible

Note: Responses typically take about one business day

- 4.2 Report an issue to Bluebeam (from the Software)
  - 4.2.1 From the Help pull-down, select "Report an Issue"



- 4.2.2 Attach Log Files window will appear
- 4.2.3 Click Yes to send all information to Bluebeam Studio



- 4.2.4 Email will open in local email application
- 4.2.5 Include a brief description of the issue, and send the email



### **QR1 Best Practices: PDF Document Preparation and Validation**

Note: For more detailed information, refer to the Design Team and/or Studio Administrator Procedure. Button screenshots are from typical Bluebeam toolbars.

### 1.0 Open Documents (Check Out & Open if working in Bluebeam Project)

If in Bluebeam Project, Right-click PDF document(s) - select "Check Out" and select "Open"

### 2.0 PDF Verification of Drawings

- Naming Named Properly per Exhibit D \*\*Rename as needed
- PDF Size PDF file size is less than 1 GB
- Sheet Count Bluebeam Sheet count and Index Sheet count match
- 2.4 Blank Stamp Area Blank area created in title block (same location all pages) for stamps
- Scanned Images Document pages regenerate quickly 2.5
- Contains *Bookmarks* . \*\*Add Bookmarks using
  - Bookmarks include Sheet number and Sheet name
  - 2.6.2 Nested by discipline
  - Audit Bookmarks (from Bookmarks pull-down menu) finds NO broken bookmarks 2.6.3
- Contains Page Labels in Thumbnails \*\*Add Thumbnails using \*\*
  - 2.7.1 Includes Sheet number and Sheet name (Page Name)
  - 2.7.2 Includes Page Scale for Floor Plans
- Page Scale Verify Arch Floor Plans contain appropriate Page Scale (found in Thumbnails). \*\*Add Preset Scale to Plan Pages using
- Layers Removed Confirm Layers are not present. \*\*Delete Layers using <sup>⊗</sup>
- 2.10 Hyperlinks Confirm Hyperlinks are present
- 2.11 Markups List Empty Confirm Document is Flattened. \*\*Flatten Document using



### 3.0 PDF Verification of Specs, Forms, Calculations etc.

- Confirm Text is Searchable
- Markups List Empty Confirm Document is Flattened. \*\*Flatten Document using 3.2
- Contains Bookmarks for major Sections. \*\*Add Bookmarks using 3.3
  - 3.3.1 Confirm each Section is listed
  - 3.3.2 Audit Bookmarks (from Bookmarks pull-down menu) finds NO broken bookmarks

### 4.0 Add UCSD Cover Sheet to all Documents requiring Session Review - MUST BE COMPLETED prior to adding initial submission documents to the Session

- Update all Sections of the Cover Sheet and Save the Cover Sheet first
- 4.2 Open the documents to be added to the Session. If in Bluebeam Project, Right-click PDF document(s) - select "Check Out" and select "Open"
- 4.3 From the "Document" pull-down menu, select "Insert > Pages from Document"
- 4.4 Click "Add" button and/or Browse to PDF titled "UCSD EPR Cover Sheet"
- Insert at beginning of each document by selecting "Before" and "First Page"
- 4.6 Click OK.
- 4.7 Save and Close (and Check In, if in Studio Project) each file. Repeat for all files going into Session

<sup>\*\*</sup> Steps to add missing items – to be completed by the Design Team



### **QR2 Best Practices: Bluebeam Studio Project Creation**

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

### 1.0 Log into Bluebeam Studio

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

### 2.0 Create a New Bluebeam Studio Project

- 2.1 Click Studio icon
- 2.2 Click *Project* icon
- 2.3 Click +
- 2.4 Click "New Project"
- 2.5 Name Project: Project #]\_[UCSD] [Project Name]
  Naming Examples (Major Cap): 4444\_UCSD Altman Research Institute
  Naming Examples (Minor Cap): 55555 UCSD Altman Bldg AC System Update

#### 3.0 Upload Bluebeam Studio Project Folder Structure

- 3.1 Right-Click and select "Upload Folder..."
- 3.2 Locate the UCSD EPR network location for the folder structure
- 3.3 Select "UCSD EPR". Click "Select Folder"
- 3.4 Verify folder structure loads into the Bluebeam Project

### 4.0 Review Documents Submitted by Design Team (Once Design Team has Submitted)

- 4.1 Locate the Design Team's submitted files in the "B.Design Team Submissions" folder
- 4.2 Right-click and Check Out..., and then right-click and Open
- 4.3 Refer to QR1 or Studio Administrator Procedure for PDF formatting verification

### 5.0 Set Permissions for EPR Project Admins and Attendees

- 5.1 Click Project Settings icon
- 5.2 In the "User Access" tab, uncheck the "Restrict Users" checkbox
- 5.3 (UCSD only) In "Permissions" tab, click + and add a Project Admin Group if applicable (Note: individual emails cannot be added here, only Groups).
- 5.4 (Design Team only) In "Permissions" tab, click + and add a "UCSD Administrator" group containing the "AdminBBMajor@ucsd.edu" and/or "AdminBBMinor@ucsd.edu" email addresses
- 5.5 (Design Team only) In "Applied Permissions", set "Full Control" permission to "Allow" for the "UCSD Administrator" group
- 5.6 Set all permissions to "Deny" for Attendees, except for "Send Invitations"
- 5.7 In "Folder Permissions" tab; Select "> Project Root". Set "Applied Permissions" to "Read/Write"
- 5.8 Click "Apply" & "OK"

#### 6.0 Invite additional Studio Administrators to the Project (as Applicable)

- The Project Admin Groups should contain the admins' emails. After adding that group to User Access and setting permissions for the group, invite the Group by email to the Project.
- 6.2 Click *Invite* icon next to project name
- 6.3 Click + to add single email address or Group OR click "Address Book" button to select Outlook Contacts/Outlook Groups from Address Book
- 6.4 To send Project Invitation immediately, click OK



### **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

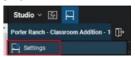
- 3.1 In Bluebeam Project, locate all PDF file(s) to be added to the new Bluebeam Session
- 3.2 Select (highlight) PDF file(s) to be included in the Bluebeam Session
- 3.3 Right-click while files are highlighted, select "Add to New Session..."
- 3.4 Name Session: [Project #]\_[UCSD] [Project Name] REVIEW

  Naming Example (Major Cap): 4466\_UCSD Altman Research Institute REVIEW

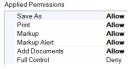
  55555\_UCSD Altman Bldg AC System Update REVIEW

### 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":



- 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"

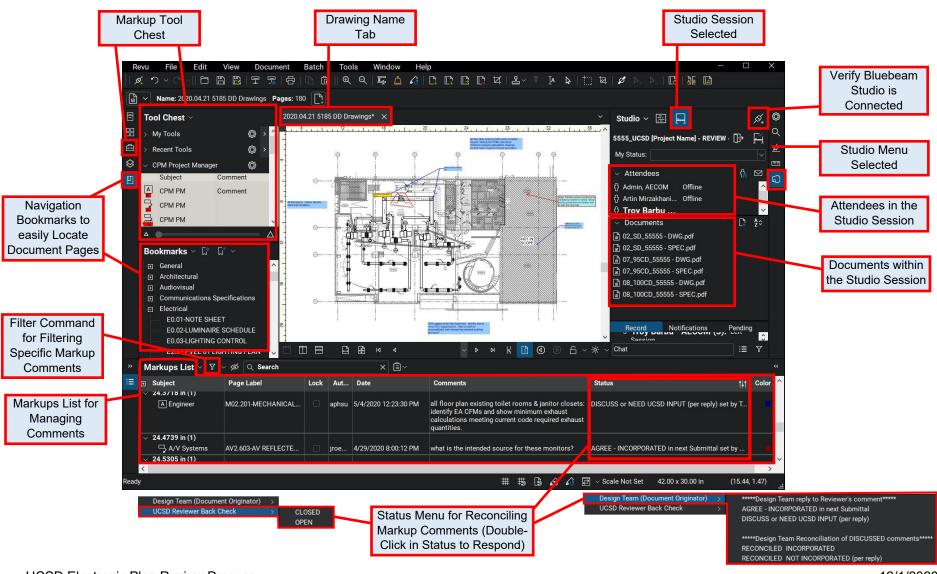
#### 5.0 Invite Reviewers to Bluebeam Session

- 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



### **QR4 Bluebeam Studio Session Layout**

Note: The Bluebeam Studio Session contains three main locations of focus: The Studio Session components, the Navigation components and the Markup components.



# QR5 Best Practices: Bluebeam Review Markup & Reconciliation by both Reviewers and by the Design Team

Note: For more detailed information, refer to the EPR Procedures for the Technical Reviewer and for the Design Team

#### 1.0 Join the Bluebeam Studio Review Session

1.1 Click on the email Session link, or Click the "+" in the Session Tab enter the nine-digit Bluebeam Studio Session ID



### 2.0 Locate the Documents in the Session for Review

- 2.1 Locate the files in the "Documents" Section within the Session Tab
- 2.2 The latest documents are typically located at the bottom of the list. Click to Open

### 3.0 Navigate the Documents

- 3.1 Use Bookmarks: click to view pages and locate the correct page
- 3.2 Use Hyperlinks: click on the page numbers (on the Sheet Index page and pages containing callouts) to hyperlink to that drawing page.

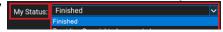
#### 4.0 Add Review Comments (UCSD Reviewer)

- 4.1 Verify the UCSD Profile has been loaded in Revu (pull-down) → Profiles
- 4.2 Verify the correct Tool Chest for Markups is selected in the Tool Chest drop-down
- 4.3 Write in complete <u>sen</u>tences when adding markup comments
- 4.4 Review and Filter markups in the bottom Markups List

# Tool Chest My Tools Recent Tools CPM Project Manager DDS Engineering DDS Inspector

#### 5.0 Alert the Studio Administrator of Review Completion

- 5.1 In the Bluebeam Studio tab, click the down-arrow within the "My Status:" box
- 5.2 Set the "My Status" to "Finished" My Status: Finished



### 6.0 Respond to Reviewer Comments (Design Team)

- 6.1 Join the Bluebeam Review Session and locate the documents. Navigate and Filter the markups to locate Reviewer comments (follow instructions in the sections above)
- 6.2 Incorporate UCSD Reviewers' Comments by double-clicking in the Status Menu
  - 6.2.1 Choose to Agree & Incorporate Comments
  - 6.2.2 Choose to Discuss Comments
  - 6.2.3 If a Comment is set for Discuss, Choose the outcome of that discussion once the Review Comment is reconciled



#### 7.0 Back Check and Close Review Comments (UCSD Reviewer)

- 7.1 Rejoin the Session and locate the previous submittal and new submittal files in the "Documents" Section within the Session Tab
- 7.2 Use Hyperlinks and Bookmarks to navigate the documents
- 7.3 Review and Filter vour markups to locate comments
- 7.4 Verify the markups have been picked up. Double-click the Status Menu to apply a back-check status markup (Open/Closed)
- 7.5 If the markup is Open, Forward (copy/paste) the markup to the subsequent submittal and Apply an "OPEN" status to a comment

