

COLLABORATIVE USE OF BLUEBEAM REVU FOR PROJECT REVIEWS FOR EXTERNAL USERS



**GENERAL INFO FOR UTILIZATION,
SECURED ACCESS AND STANDARD USE FOR DESIGN
PROJECTS WITH TXDOT PARTNERS**



SEPTEMBER 2023



GENERAL PREFACE AND NOTES

This technical write up is intended to provide the external user to gain familiarity on how the El Paso District TxDOT office reviews all design plans and other documents, estimates, notes, correspondence and maps using Bluebeam REVU software. This procedure is standard throughout all TxDOT districts in both interdepartmental functions and external business operations.

Future External and Consultant use of Bluebeam REVU for Collaborative document review with El Paso TXDOT HQ

Other government entities and consultants working on projects with or for TXDOT can download Bluebeam REVU 2020 software for a 30 day trial period with full capabilities. After the 30 days it can still be utilized but in document "VIEW" only mode which will restrict all users to view the documents in a live TxDOT Session with limited markup utilization. The external user (attendee) will be limited in function but will be able to attend sessions. It is recommended that either the consultant or government entity review user specifications and recommendations if considering purchasing the full software suite. If the consultant/government entity does decide to purchase the full Bluebeam REVU 2020 and or 2021 suite they can request pre programmed standardized Txdot Bluebeam tools and configuration files to comply with the El Paso District review standards. This option is voluntary and is not a requirement. Bluebeam has the capability to have multiple users collaborate in the session and the ability to markup the document simultaneously with other users and be able to see their comments in realtime.

About Bluebeam REVU Extreme 2020 (Source: Nemetschek Group)

Bluebeam launched in 2002, and adoption of our solutions by the worldwide AEC community has grown steadily ever since 2003, when DMJHM+H (currently AECOM)—one of the world's largest design and engineering firms—chose Bluebeam Pushbutton PDF as its markup and collaboration solution.

Today, over 2 million people throughout the world use Bluebeam Revu®. In the US, the Bluebeam Revu is a critical partner for the majority of top AEC firms. Bluebeam is rapidly expanding their presence, with an office in Sweden and customers in 160 countries. In 2014, Bluebeam joined the Nemetschek Group, this partnership allows both Bluebeam and the Nemetschek company to connect with even more AEC professionals around the world. For more info on Bluebeam Revu Extreme Software you can visit <https://www.bluebeam.com/company> for further details.

(Source : www.bluebeam.com/company)



How Bluebeam works and access thru email invite

It is important that your staff setup their accounts to gain access to email invites. The external user (attendee) will receive an email invitation from studio@bluebeamops.com that will have session subject name and summarization of the project. The email will also include a Bluebeam Session ID number that is hyperlinked in blue that will gain you access to the session, you can also click the join session button as an option. Please do not confuse the Session ID number with the CSJ they are completely different.

See example of email invite below:

The screenshot shows an email from studio@bluebeamops.com to Luis Sanchez III. The subject is "You've been invited to Studio Session 100% PLAN REVIEW (Local Gov't)". The email body features a large "SAMPLE" watermark and a "Join Session to Start Collaborating" header. Below the header, there is a session summary and a "Join Session" button. Red annotations highlight the session name, the session ID hyperlink, and the green "Join Session" button.

Session Name

Click Session ID hyperlink to enter (option 1)

Click Green Session Button to enter (option 2)

Session summary, milestone and deadline for project. Session invitation message can be tailored to convey the type of review or need

After you click the Session ID or Join Session button Bluebeam REVU will initiate on your machine and start up the program. Only those attendees who received the invite will have access to that specific session. If you need additional personnel to be added to the session you will have to contact the session administrator by email and request access/invitation to the Bluebeam session. You cannot share the invite due to restrictions of users by their email and its security protocol settings.

Bluebeam interface and signing in procedures

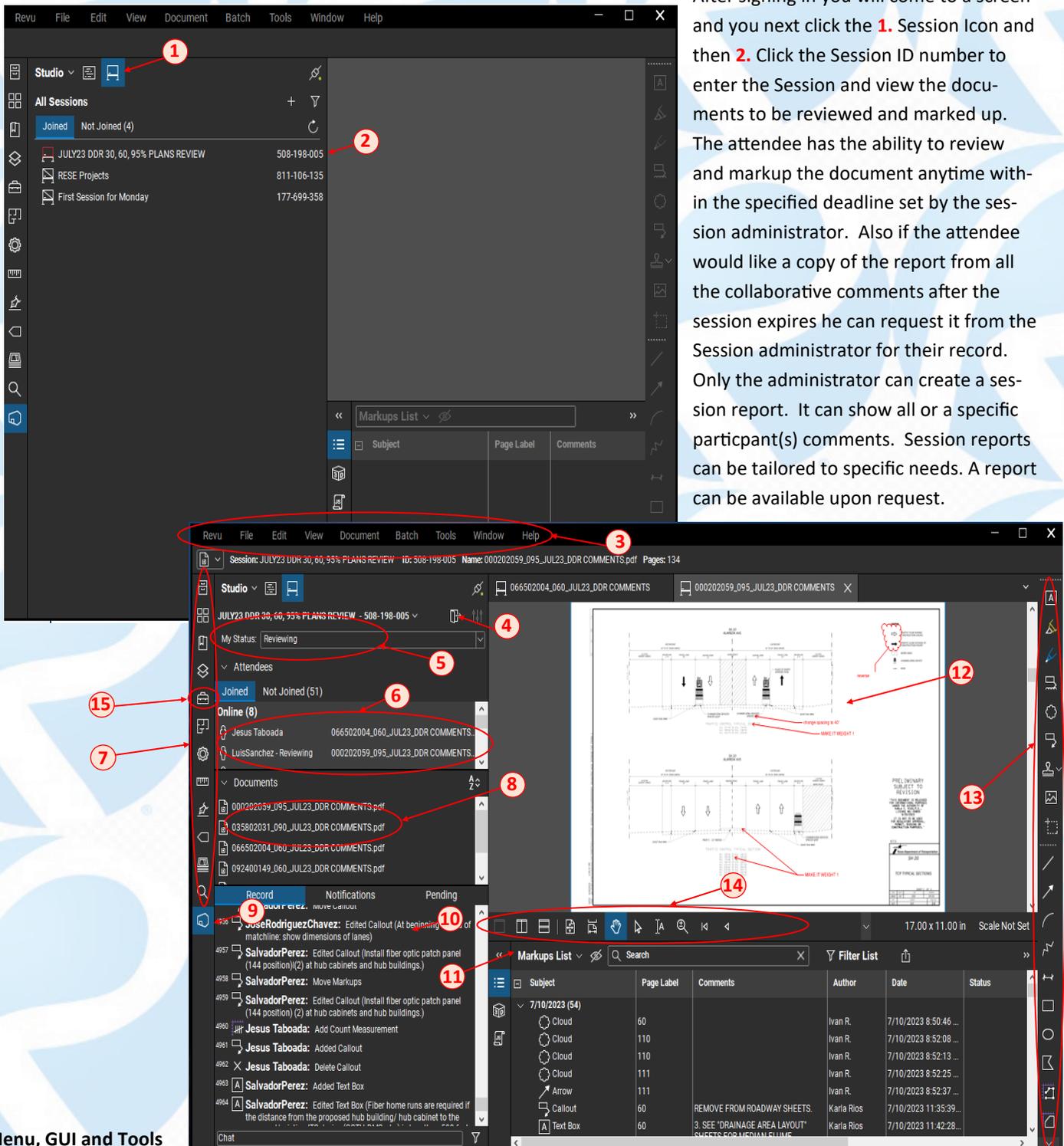
The next screen you will see is the sign in dialog box. **1.** You must set the server to USA or the USA flag to be able to access the session sent to you by email. **2.** Click “Sign In” and then **3.** click the “Create Account” tab. There you will enter your user information, email and create your Bluebeam Display Name that you want as your identification in the live sessions. After creating the session you will get an account confirmation email and click to confirm your registration. **4.** After all is completed you will then go back and click the “Sign In” tab and login into Bluebeam to start up the live session to start adding comments to the documents during the scheduled review.

The image illustrates the Bluebeam interface and the steps for signing in and creating an account. It features four overlapping windows:

- Bluebeam Studio Interface:** Shows the main application window with a menu bar (Revu, File, Edit, View, Document, Batch, Tools, Window, Help) and a toolbar. The central area displays the Bluebeam Studio logo and a "Sign In" button with a USA flag icon. Red circle **1** points to the flag icon, and red circle **2** points to the "Sign In" button.
- Create your Bluebeam account:** A web page with the Bluebeam logo and the heading "Create your Bluebeam account". It has two tabs: "SIGN IN" and "CREATE ACCOUNT". Red circle **3** points to the "CREATE ACCOUNT" tab. The form includes fields for First Name (Jane), Last Name (Smith), Bluebeam Display Name (?), Email (jane.smith@company.com), Password, and Confirm Password. A "Create Account" button is at the bottom.
- Sign in:** A web page with the Bluebeam logo and the heading "Sign in". It has two tabs: "SIGN IN" and "CREATE ACCOUNT". Red circle **4** points to the "SIGN IN" tab. The form includes a "Bluebeam ID (Your Email Address)" field (e.g., youremail@company.com) and a "Next" button.
- Sign In:** A web page with the Bluebeam logo and the heading "Sign In". It includes a "Bluebeam ID (Your Email Address)" field (Luis.Sanchez@txdot.gov) and a "Password" field. A "Sign In" button is at the bottom.

Entering the Active Session Environment

After signing in you will come to a screen and you next click the **1.** Session Icon and then **2.** Click the Session ID number to enter the Session and view the documents to be reviewed and marked up. The attendee has the ability to review and markup the document anytime within the specified deadline set by the session administrator. Also if the attendee would like a copy of the report from all the collaborative comments after the session expires he can request it from the Session administrator for their record. Only the administrator can create a session report. It can show all or a specific participant(s) comments. Session reports can be tailored to specific needs. A report can be available upon request.



Menu, GUI and Tools

- 3. Bluebeam Pull down menu
- 4. Exit Session
- 5. Review Status
- 6. Attendees list
- 7. Bluebeam System tools
- 8. Document list
- 9. Bluebeam home button (default GUI interface)
- 10. Attendee record and comment history
- 11. Markups list
- 12. Document window view
- 13. Markup tools
- 14. Windows navigational view
- 15. Tools by profession

GENERAL QUESTIONS AND SUPPORT

External users can contact session administrator or the Project Management Office (PMO) for session support and session related issues or other questions at 915-790-4290, El Paso District Office. Re-requesting invite and access to a session initiated by the PMO office to the live collaborative sessions, project reviews will be the sole responsibility to the external user to contact PMO if that condition occurs. Review Comment Form (RCD) will be distributed by the PMO office to those external entities for every project reviewed. Bluebeam Session and comment form will have a PMO standardized report format that will be provided to the external participant for their record of the collaborative review after the session expiration date. The TxDOT PM who will be provided the marked up pdf plan sets and related documents for distribution of external entities. If the external entity did not receive the markups they can contact the PMO office to notify the TxDOT PM to gain copies of that sessions review.

Operating system, access and licensing subscription options

Bluebeam works thru a Windows OS with options for single user license or Enterprise environment license pool account. It is best used on a laptop or desktop. The current supported release version TxDOT utilizes is the **Bluebeam 2020 REVU Extreme**. It is used statewide throughout the 25 District offices including Design, Traffic, Bridge and Construction Divisions. It is becoming a national standard with other state DOT's, consultants and Government entities for collaborative review of engineering projects and document control. Non-subscribers can have a free 30 day trial for the full use of Bluebeam can set up a Bluebeam ID, install Revu 20 (Revu 21 available), and sign in to access Studio, after the 30 days it must be purchased for full use. Within Studio, they'll have limited colors and markup options – such as cloud, call out, lines and arrows. For Bluebeam Cloud, subscribers can invite collaborators to view files and markups, as well as interact with punch items, RFIs and submittals on the web.

United States

Phone: 626-788-4100 / Toll-free: 1-866-496-2140

Hours: 8:00am–8:00pm ET (M–F)



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