BLUEBEAM USER GUIDE

DOCUMENT MANAGEMENT

INEIGHT

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CHAPTER 1 –

CHAPTER 1 – INTRODUCTION TO BLUEBEAM INTEGRATION

This guide covers the setup and functionality of InEight Document's Bluebeam Integration.

1.0.1 BUSINESS PROCESS OVERVIEW

Bluebeam is an industry standard like Adobe Acrobat Pro and collaboration tool used to assist with the creation, editing and annotation of smart PDF files. InEight Document's integration tool provides a seamless experience between the document control and review functionality in Document and Bluebeam's PDF management capabilities.

There are 2 options for using Bluebeam:

- **Bluebeam RevU** – Lets you make ad-hoc markup and change the document version rather than changing the entire revision of the document.
- **Bluebeam Studio** – Lets you use InEight Document's Review & Approval System incorporating Bluebeam.

1.0.2 REQUIREMENTS

To start Bluebeam functionality in Document, work with your Project Delivery consultant to enable the following on relevant projects.

Function / Items Required	Purpose	Responsible Party
Bluebeam	Bluebeam software installed on required PC	Customer
Versioning (optional)	A customization enabling multiple versions per document revision. It is only required when using Bluebeam RevU	InEight

Function / Items Required	Purpose	Responsible Party
Single Sign On (Optional)	To facilitate document authentication between InEight Document and Bluebeam	InEight / Client
Default Document Attributes	A set of default mandatory document attributes should be defined to generate a History Document Defaults i.e., Discipline, Area, Revision, Status and Type	InEight / Client
Bluebeam Studio Session Link	Bluebeam Studio Session link in Project Setting should be enabled in the relevant project.	InEight
Licenses	A Core or Complete license type is required when using Bluebeam Studio. 1. **Service Account** – To facilitate the bridge between InEight Document and Bluebeam, this service account cannot initiate any documents. For example, bbintegration@ineight.com. **2. Review Initiator** Each Review initiator must have a Core or Complete Bluebeam license. NOTE A minimum of two licenses are required. The review initiator and the service account cannot be the same.	Client

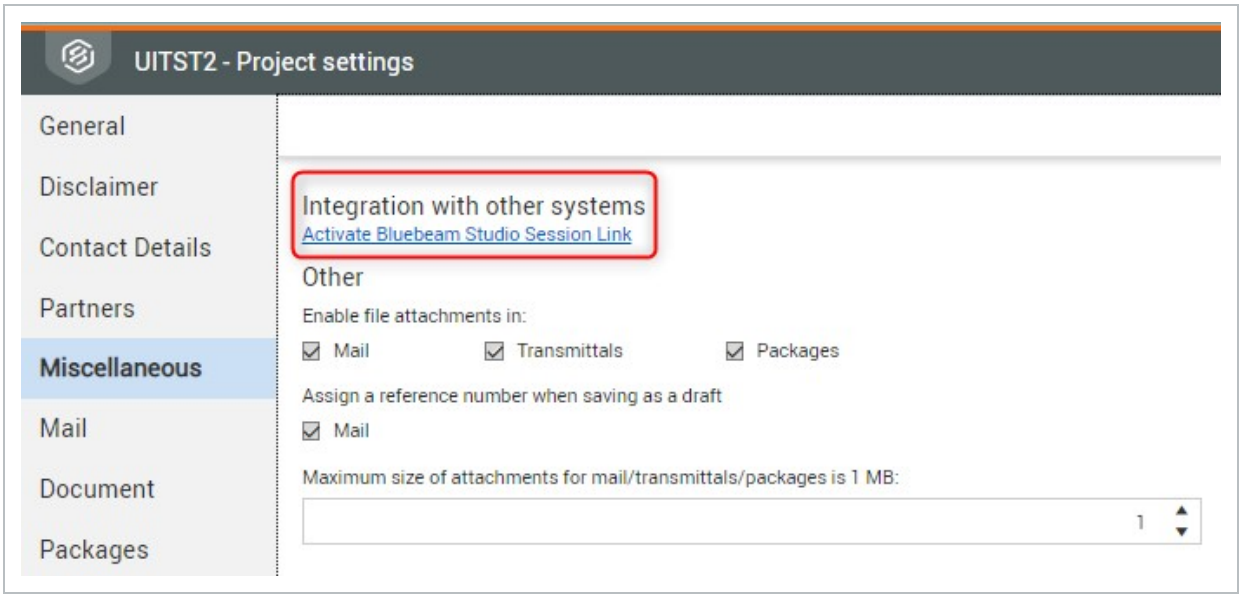
CHAPTER 2 – SETTING UP BLUEBEAM INTEGRATION

Before you use Bluebeam to check out or review documents, you must ensure the following:

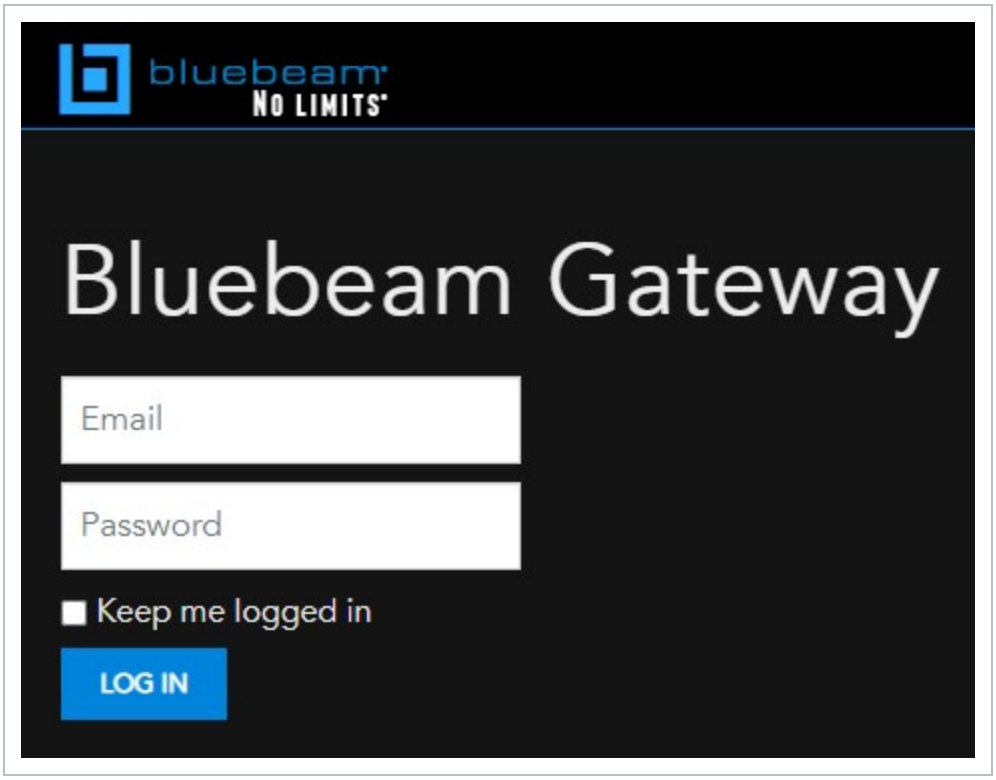
- The Bluebeam studio session integration is activated in InEight Document
- Bluebeam is linked with Document
- The Google Chrome ClickOnce extension has been installed

2.0.1 ACTIVATING BLUEBEAM STUDIO SESSION IN INEIGHT DOCUMENT

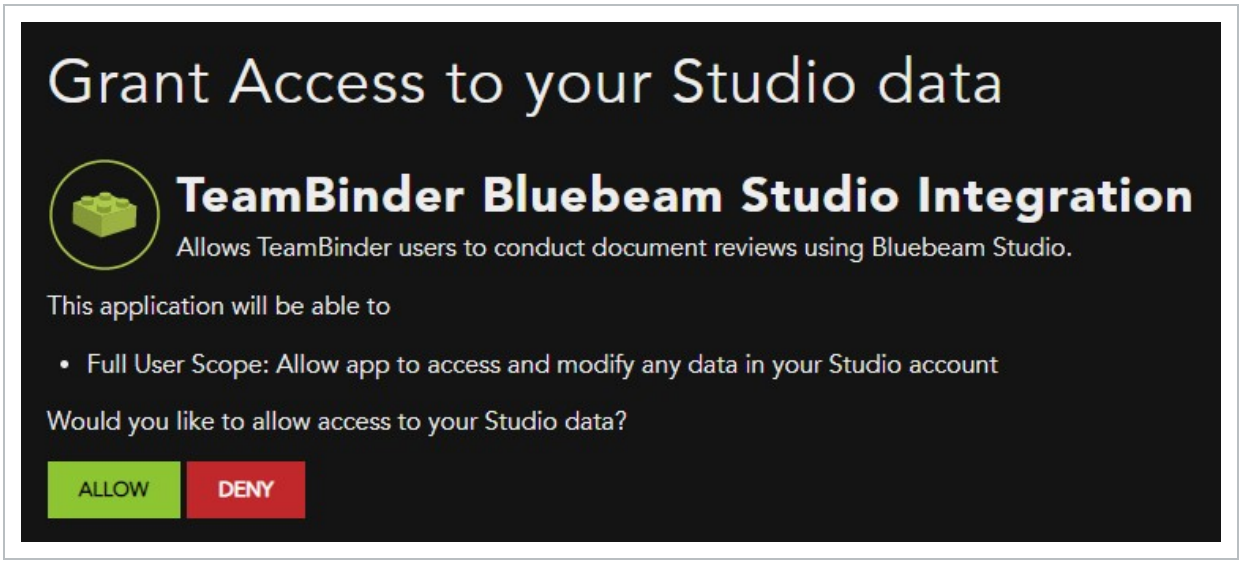
1. After your project delivery consultant has enabled the Bluebeam setting in the back end, the option **Integration with other systems** shows in the **Project Settings** → **Miscellaneous** section.
2. Click **Activate Bluebeam Studio Session Link**.



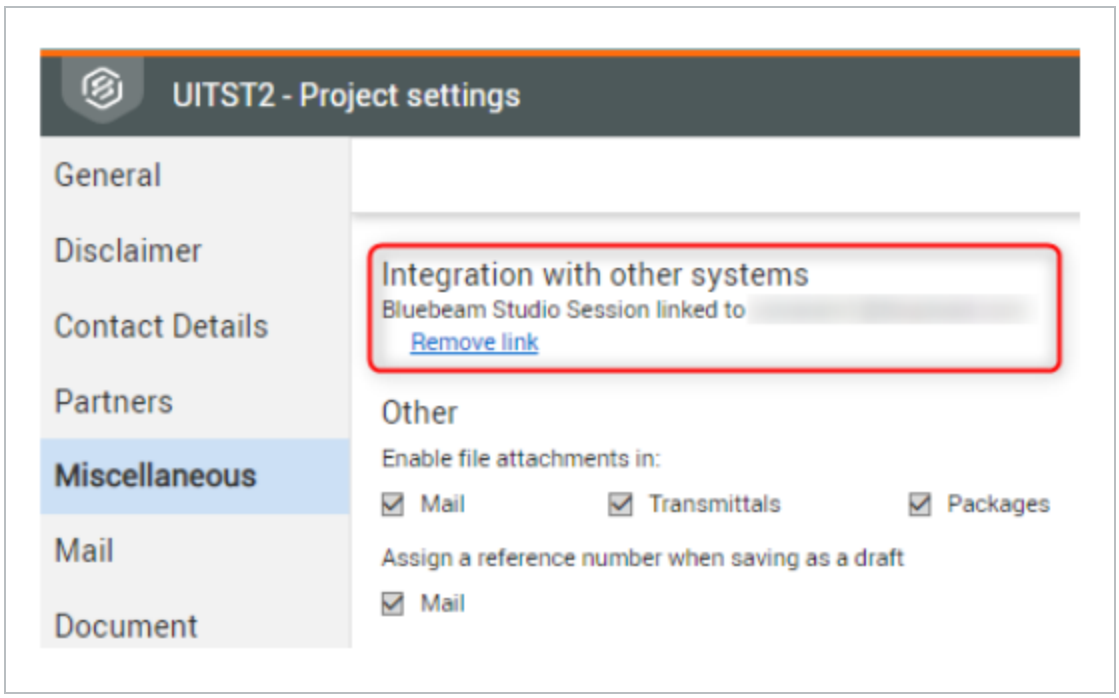
3. You will be prompted to log-in to Bluebeam Gateway. Use the service account to log-in.



4. A message will be displayed requesting to grant integration the access to your Studio data. Click **Allow.**



5. A successful message will be prompted. Your project has now been successfully linked to Bluebeam Studio Session.

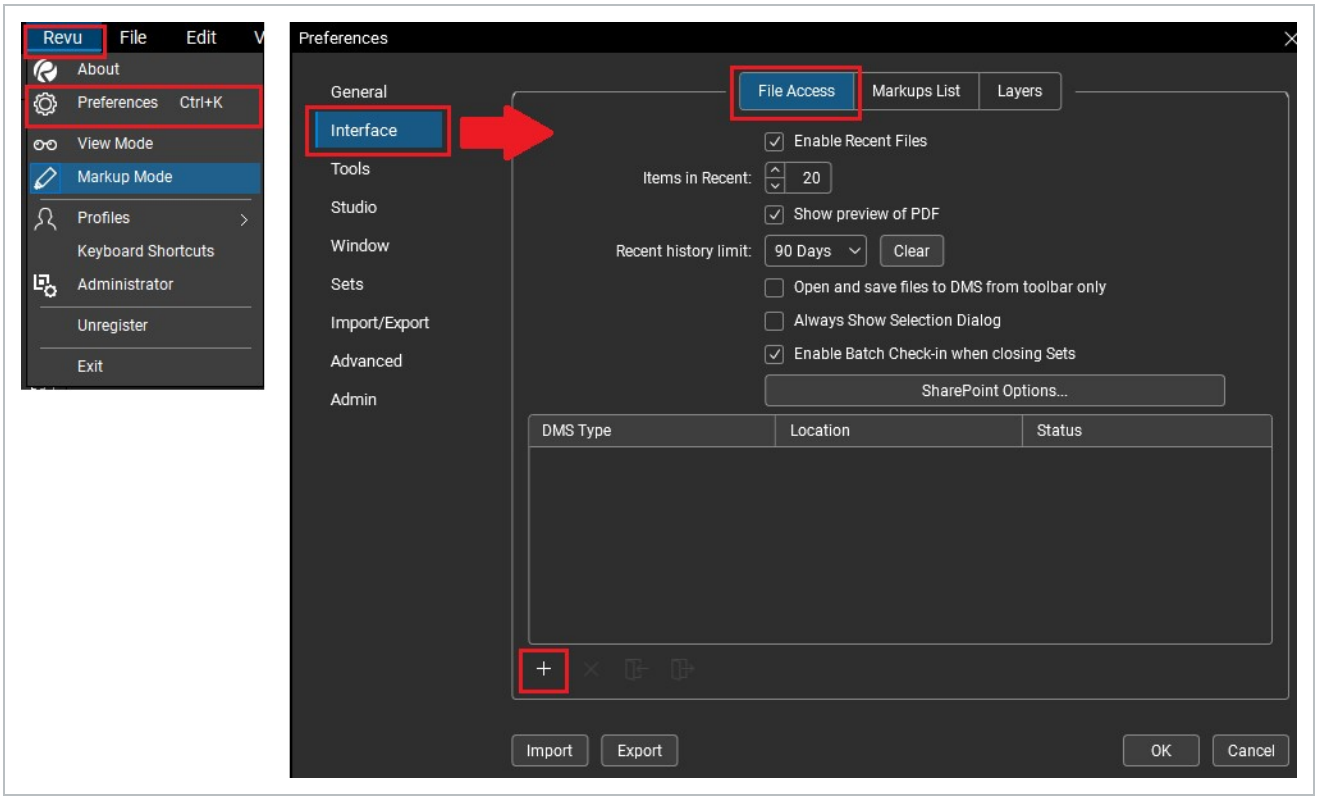


NOTE You can change the service account email address by clicking 'Remove link', however, ensure that there are **NO** active Bluebeam sessions.

2.0.2 LINKING BLUEBEAM WITH INEIGHT DOCUMENT

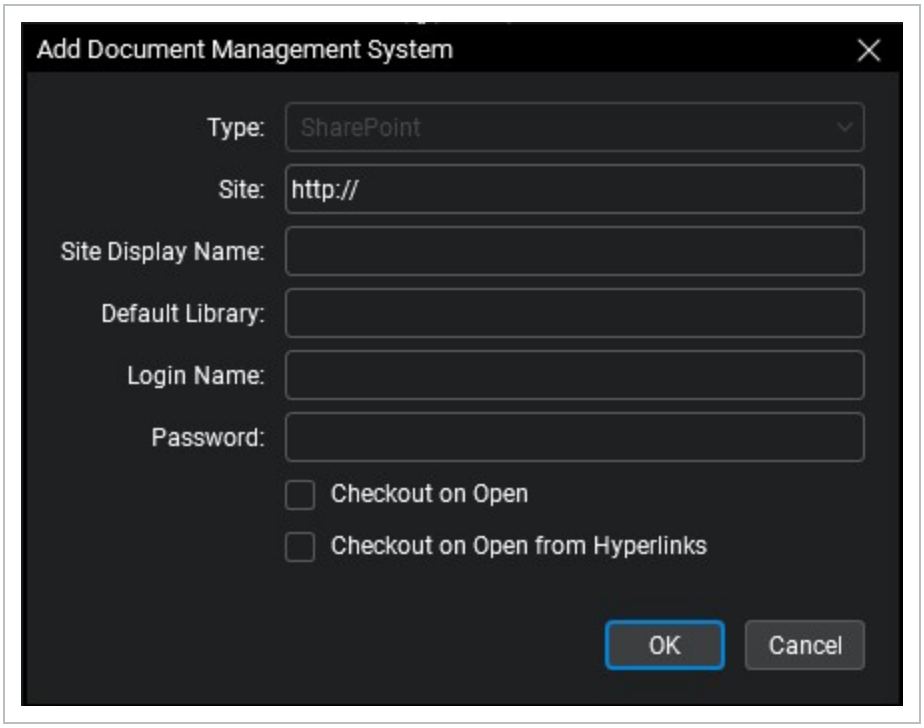
Bluebeam connects with InEight Document using Bluebeam's SharePoint integration capabilities. To set up this integration capability, follow the steps below.

1. From the Bluebeam menu, click **RevU** and then select **Preferences**.
2. Under **Interface** section, click **File Access** tab then click **Add**.

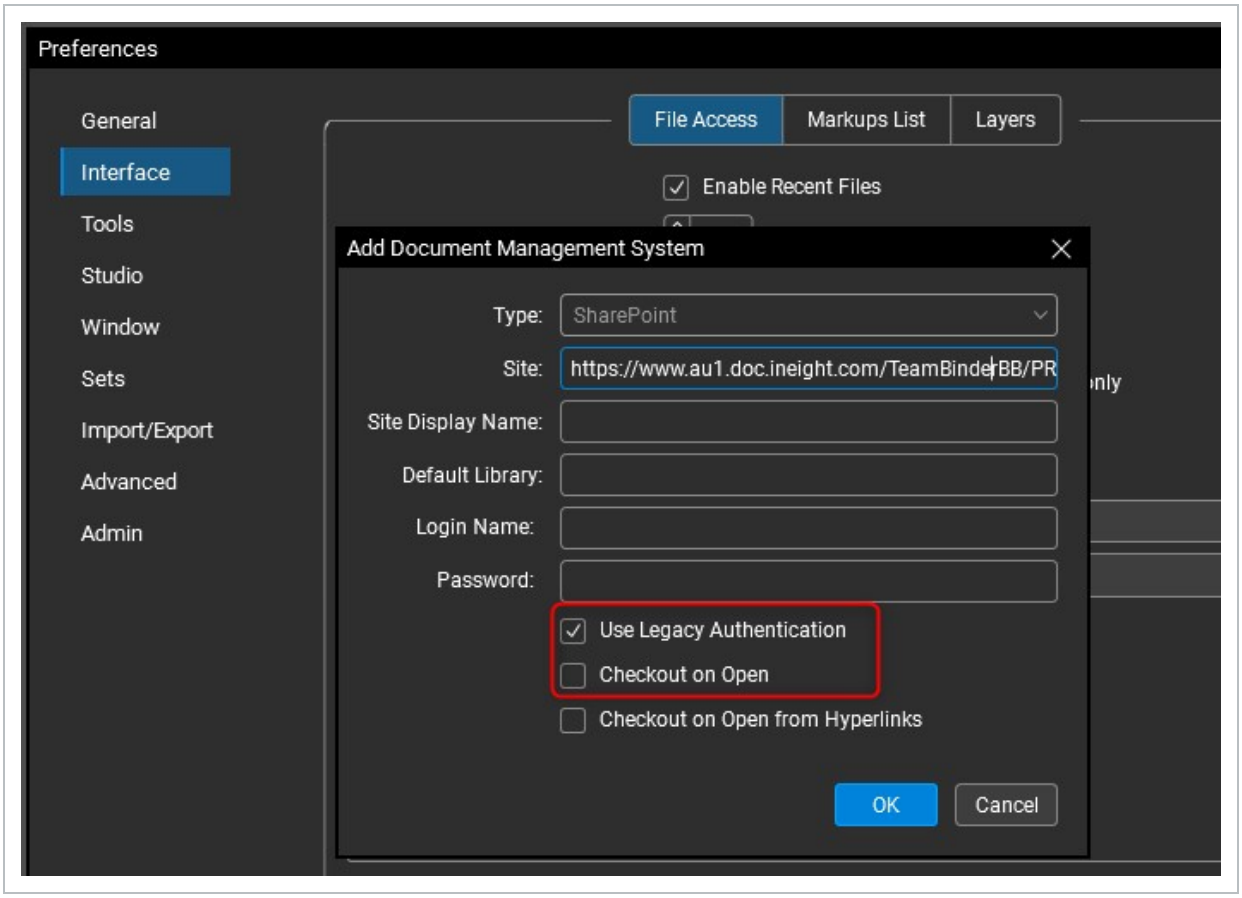


3. Enter the InEight Document Project address into the **Site** field. The address format will be `https://www.au1.doc.ineight.com/TeamBinderADFS/PROJNO/VPDEMO/` where the text marked in **bold italic** will be the variables from project to project:
    a. `www.au1.doc.ineight.com` identifies the server that the project is located on. If you are unsure, this will be displayed in the URL when you log into your project (e.g., in this case, it's `au1.doc.ineight.com`).

b. `VPDEMO` identifies your project number on the server.



4. If you are using version 20 or later of Bluebeam Revu, ensure that the option **"Use Legacy Authentication"** is checked.



5. Select the **Checkout on Open** checkbox (as shown above), to enter editing mode automatically once the document is opened in Bluebeam. Note that documents must be checked out before new versions can be created within Bluebeam.
6. Select **OK**.
7. This provides users with a list of all PDF file formats against each document to select from.

NOTE

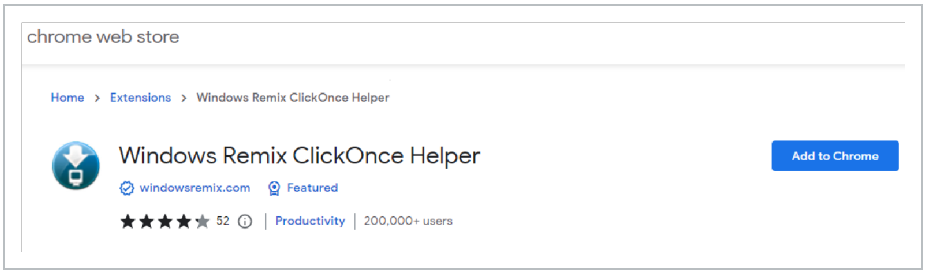
- If your company is not using Active Directory Single Sign on. The URL will be https://**www.teambinder.com/TeamBinderBB/PROJNOVPDEMO/ (refer above for explanation of URL)**
- To further sort this document list by field (e.g. 'Disciplines' & 'Type'); specify a direct path within the **Site** field. For example (refer above for explanation of URL): https://**www.teambinder.com/TeamBinderADFS/PROJNOVPDEMO/Discipline/Type**

2.0.3 INSTALLING GOOGLE CHROME - CLICKONCE EXTENSION

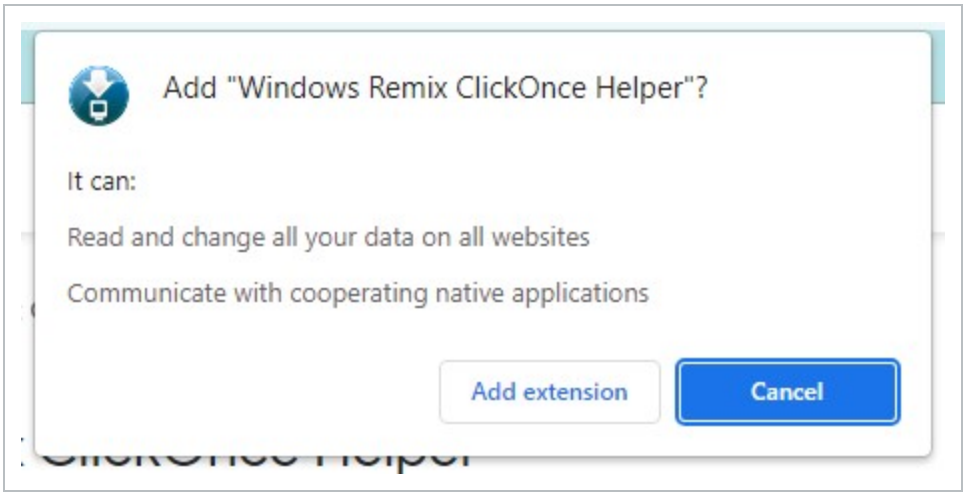
When using Google Chrome browser to log-in to your InEight Document project, you can open the document with Bluebeam RevU if you have installed the ClickOnce extension. ClickOnce is required for the following Bluebeam options:

- Documents Register → Actions → Open latest version with Bluebeam
- Release Register → Bluebeam column → Open link To install ClickOnce:

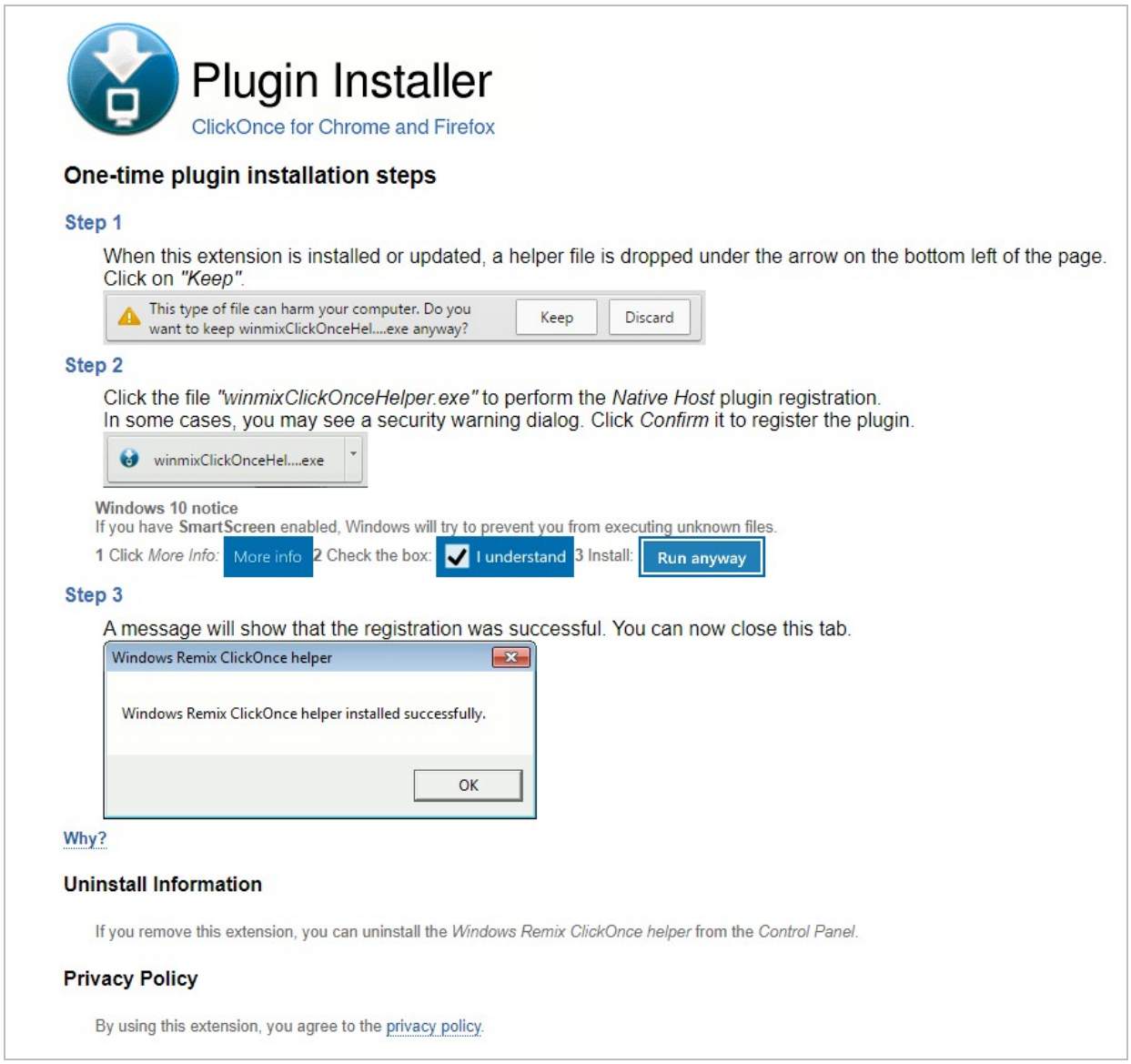
1. Within Chrome browser, click ⋮ at the top right → **More tools** → **Extensions**.
2. Remove any existing ClickOnce plug-ins.
3. Open the Chrome Web Store.
4. Find and select '**Windows Remix ClickOnce Helper**'. You may also click this link to download the extension.
5. Click **Add to Chrome**.



6. Some extensions will let you know if they need certain permissions or data. To approve, click Add extension.



7. The download will appear in the lower-left corner of your browser window along with a walkthrough of how to complete the installation.



8. The extension has now been successfully installed. You can now go to your project and try accessing the options (listed above) to open your document with Bluebeam.

CHAPTER 3 – USING BLUEBEAM STUDIO SESSION

VIDEO | Document Review with Bluebeam

This section provides an overview of Bluebeam Studio's document review capability using InEight Document's Review & Approval System.

3.0.1 SETTING UP THE BLUEBEAM REVIEW PROCESS

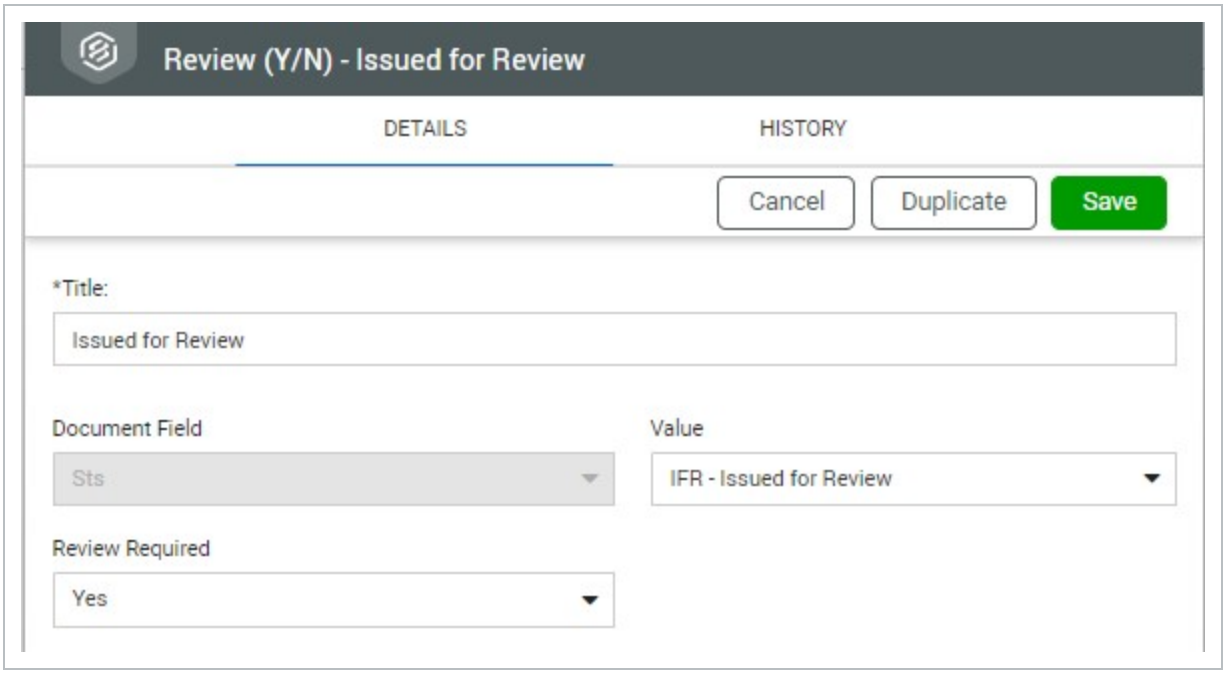
The InEight Document default review process allows users to:

- View and mark-up PDF files and other file formats using Online Viewer
- Add text comments and
- Attach external files related to comments.

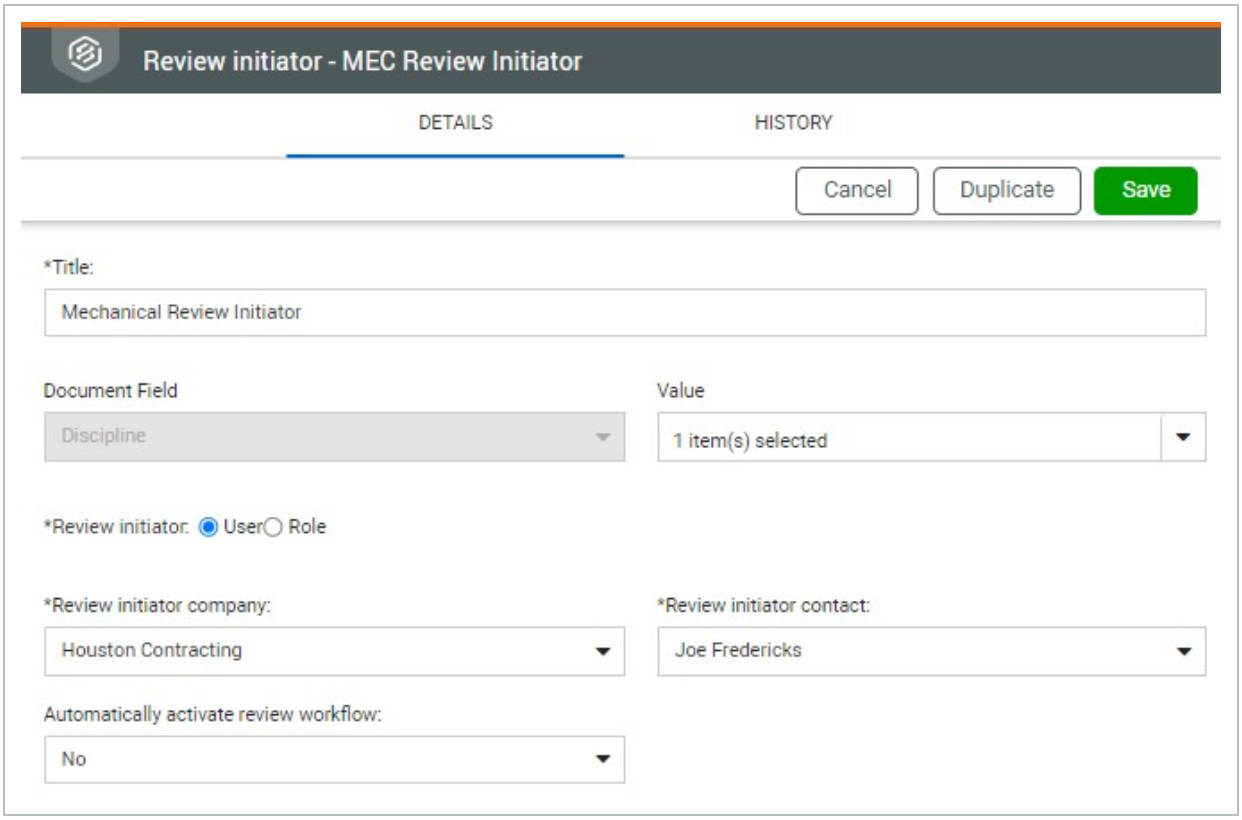
With Bluebeam Studio's integrated review process, however, Bluebeam Studio Sessions are used instead of the Online viewer to review **PDF** files **only**. Document review is set up in InEight Document using predefined attribute-based review teams or free form review teams as normal. Once the review is activated, a Bluebeam studio session will be created.

The steps to establish a Bluebeam review process are as follows:

1. Setup a **Review Y/N Rule** in InEight Document with a 'Status' that triggers a review.



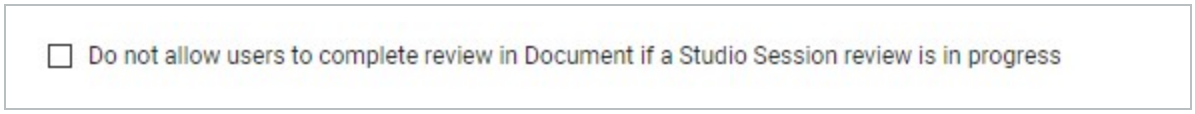
2. Ensure the Review Initiator is set to manually activate the workflow in InEight Document. If the review is activated automatically, the standard InEight Document review process will occur instead.



3. Users complete their reviews via Bluebeam Revu/Vu and set the status in Bluebeam as **Finished**. Until they complete their review, any existing Bluebeam Studio Session functionality, such as leaving the session temporarily, notifying other users, and chatting with other participants can be carried out as per the standard Bluebeam studio session processes. [Please refer to Bluebeam website for further information].
4. If the review process has any optional reviewers, they will also be added to the session and allowed to make comments using Bluebeam during their review sequence.
5. If the review step is configured using '**Either**' option, all reviewers in that step will be added to the session. Upon completion of review by any one of them, the review process will move to the next step.

NOTE

Reviewers can also use InEight Document to complete the document review however this will also complete the review in Bluebeam. This may be required to markup alternative view file formats during the review. To stop reviews being completed the following project setting will need to be enabled. This will not permit the ability to review the document using InEight Document if a studio session is in progress.

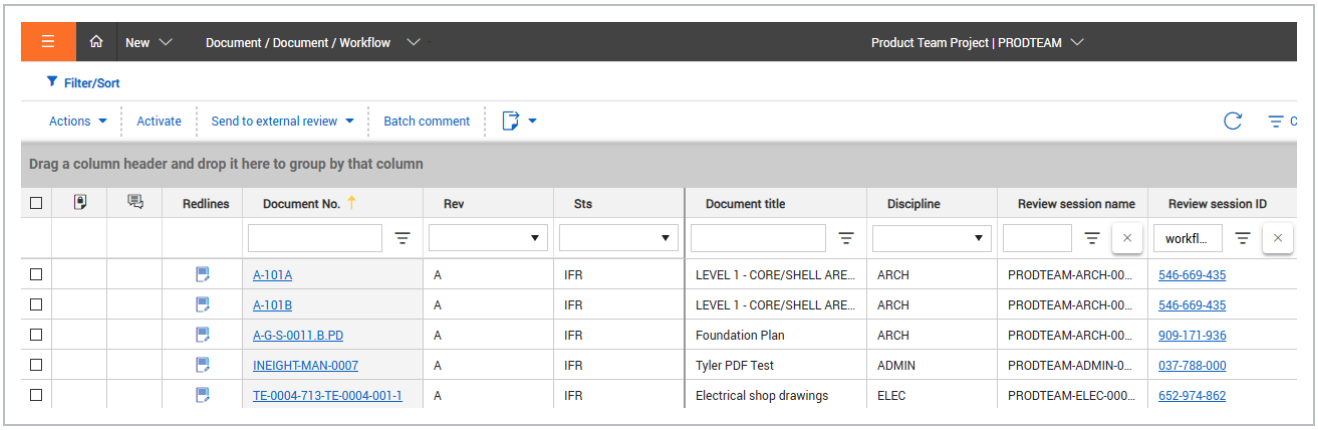


3.0.2 ACTIVATING A BLUEBEAM REVIEW

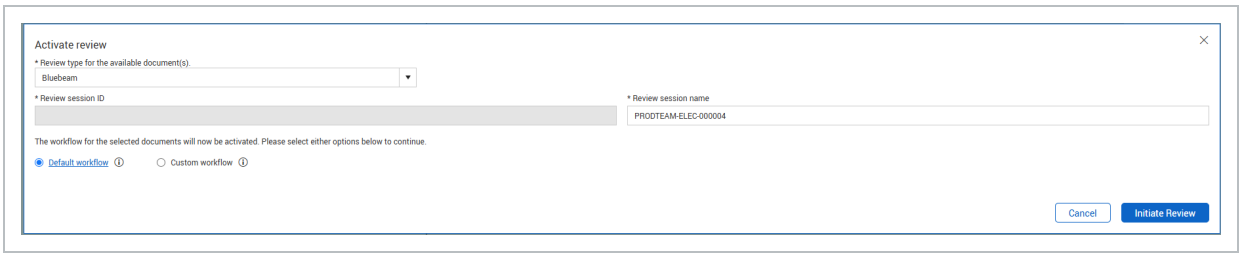
VIDEO | Initiating a Bluebeam Review

The **Manage workflow** screen allows the Review Initiator to select the necessary documents and initiate the Bluebeam workflow process. To accommodate Bluebeam reviews, Bluebeam Session Name and Bluebeam Session ID columns have also been added to the **Manage workflow** register.

As a Review Initiator, you can go to **Document** → **Manage Workflow** → Select the document → **Send to External Review** where you can select one of the following:

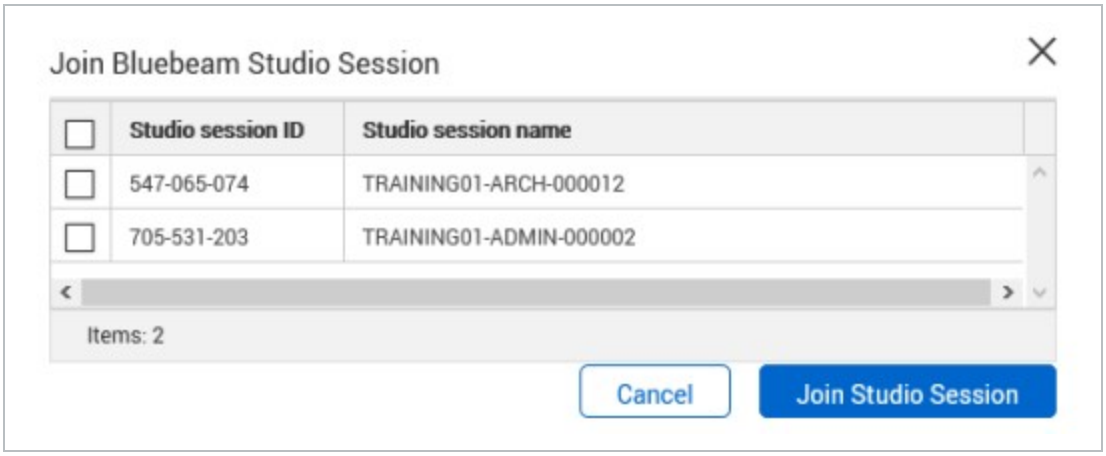


1. **New Studio Session** — allows to initiate a new studio session. Once selected, it will display a screen with the proposed Bluebeam session name in an editable textbox. By default, the session name will be created based on default attributes e.g., Project Number, Discipline, etc. If multiple files are selected, the first selected document will be used to create the Studio Session Name. This is the only stage the Session Name can be modified by the Review Initiator. The corresponding Session ID number will be generated automatically and displayed in the Document Review Screen register.



2. **Existing Studio Session** — allows to add selected document(s) to an existing studio session. Once selected, a window will be displayed showing all existing sessions. Select the studio session that

you would like the selected document(s) to be added to.



3. **Split Studio Session** — allows documents in an existing studio session to be split and create another session if required.

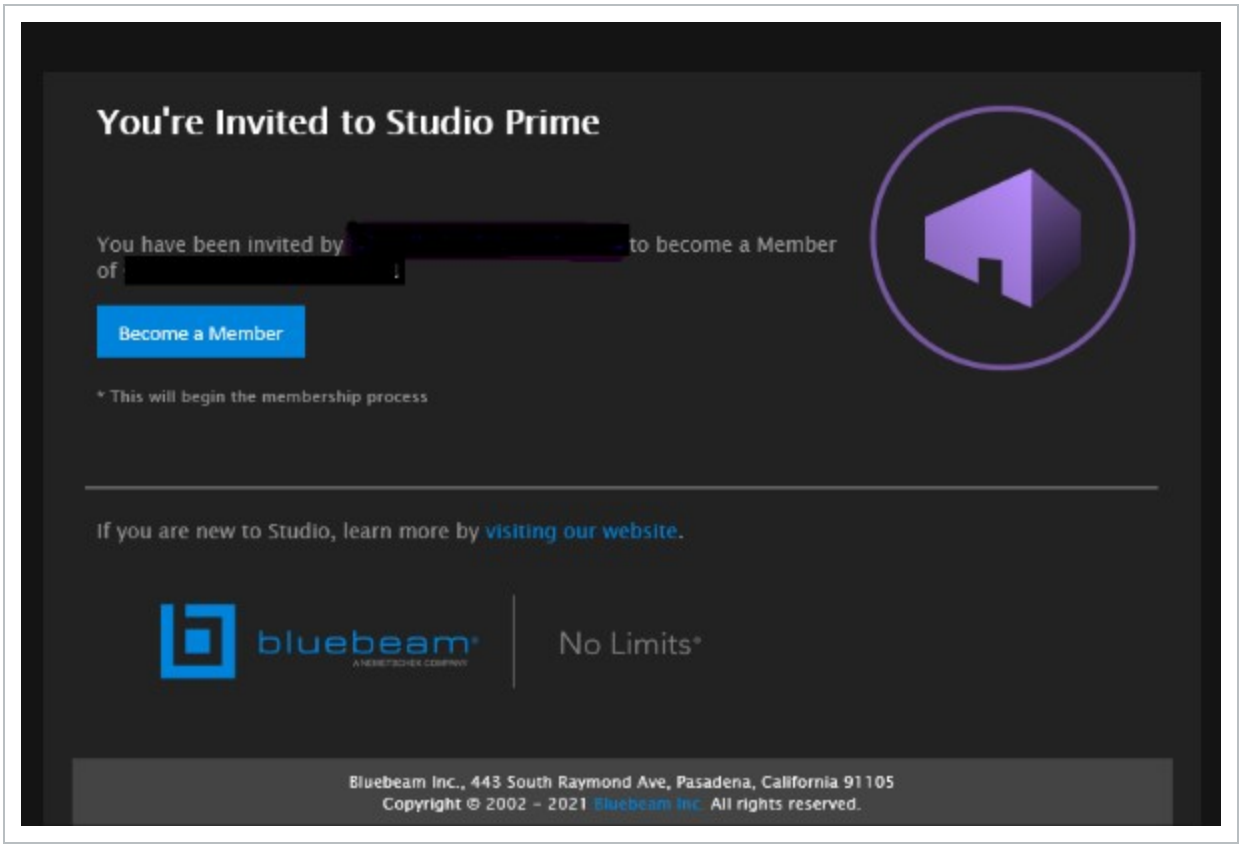
NOTE

- The Document workflow is completely controlled via InEight Document. There is no option to manage the reviewers or documents within Bluebeam during the review process.
- If any change is made to any document in the document workflow (e.g., adding or removing reviewers) during review, the change will be applied to all documents in the same Bluebeam session.

3.0.3 REVIEWING DOCUMENTS IN BLUEBEAM FOR THE FIRST TIME

The first time a Member of your Studio space uses an Integration, the user will have to authenticate and grant the access to Studio data. The way to arrive at this step will vary, depending on the Integrator's implementation.

1. An invitation will be sent by your Bluebeam administrator to your dedicated email address where you will create your unique password.


You're Invited to Studio Prime
You have been invited by [redacted] to become a Member of [redacted].
Become a Member
* This will begin the membership process
If you are new to Studio, learn more by visiting our website.
bluebeam
No Limits
Bluebeam Inc., 443 South Raymond Ave, Pasadena, California 91105
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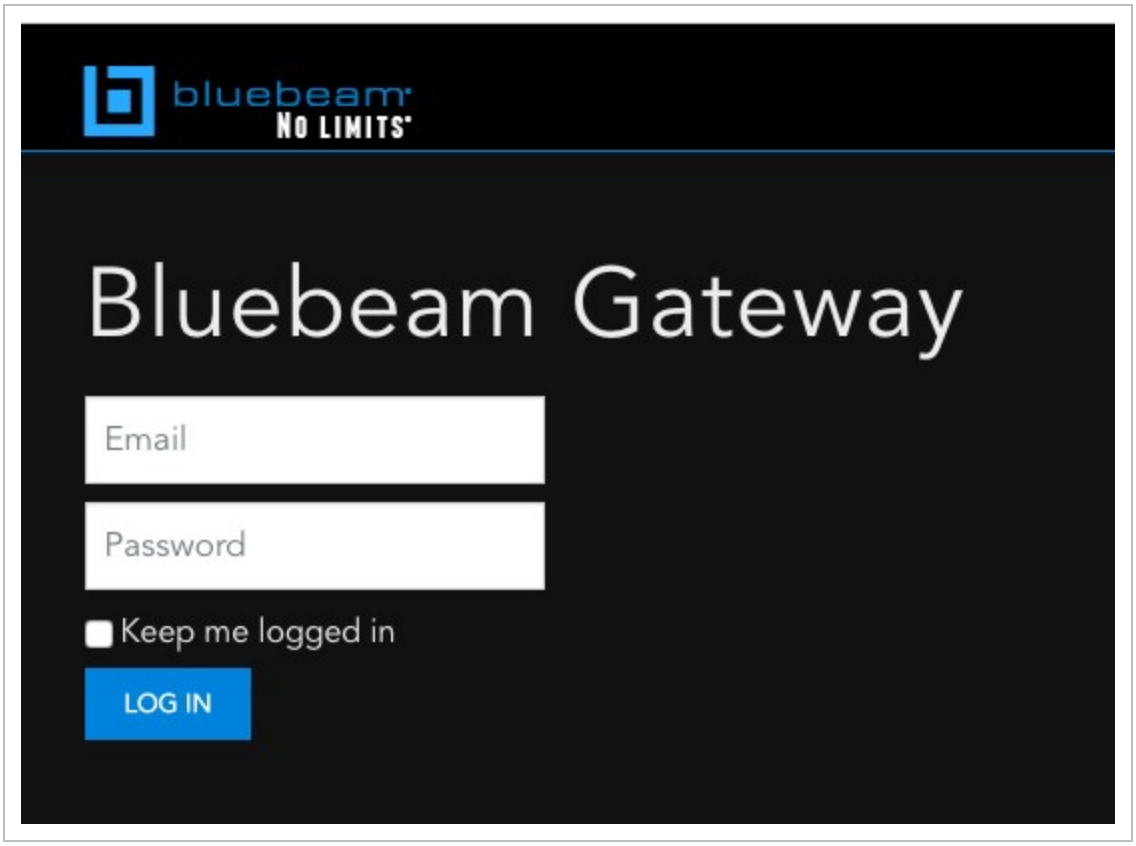
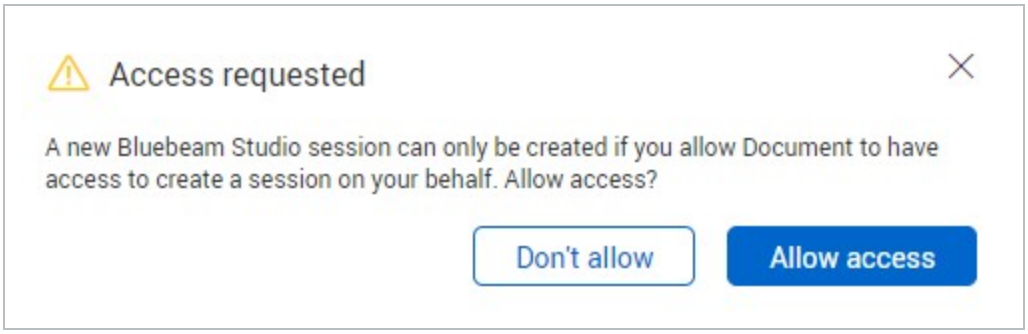
2. Log-in with your Studio account credentials.

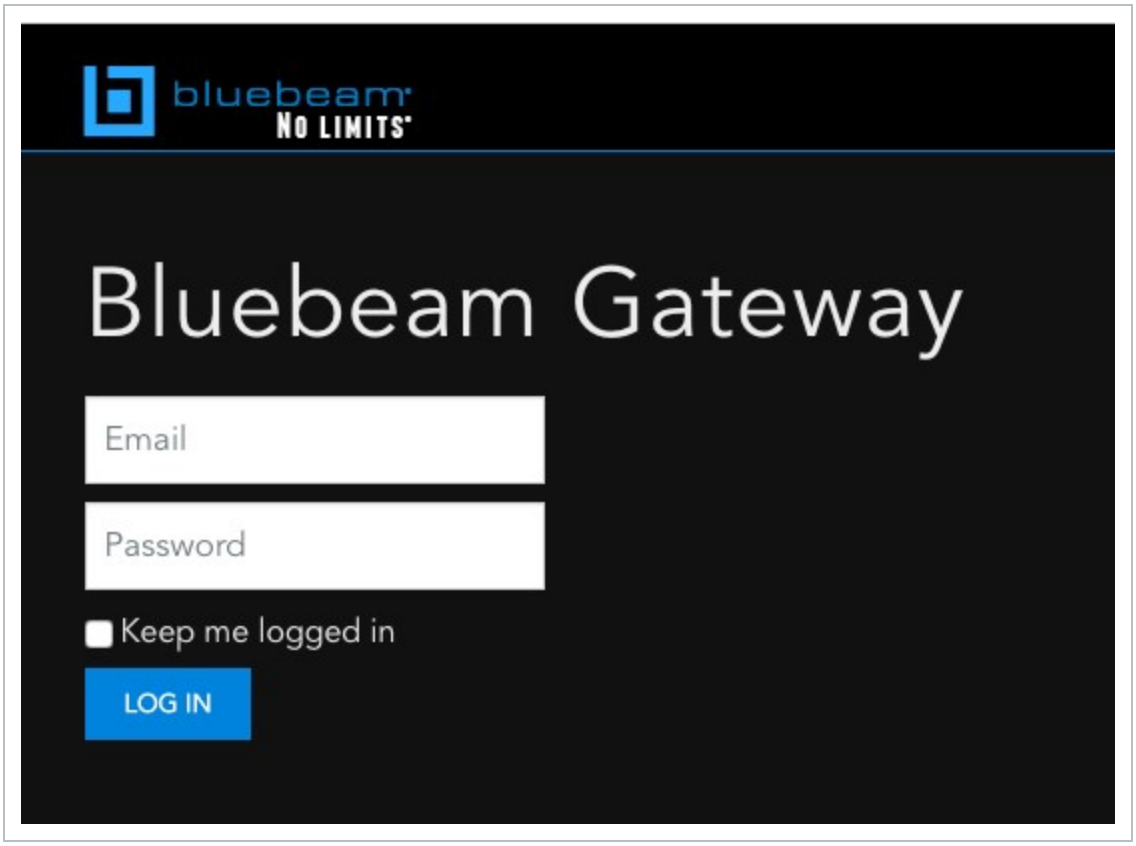


Make sure you are a Member of the Studio account – use the email and password received via Bluebeam Invite.

3. This is a one-time approval where you will need to allow access.

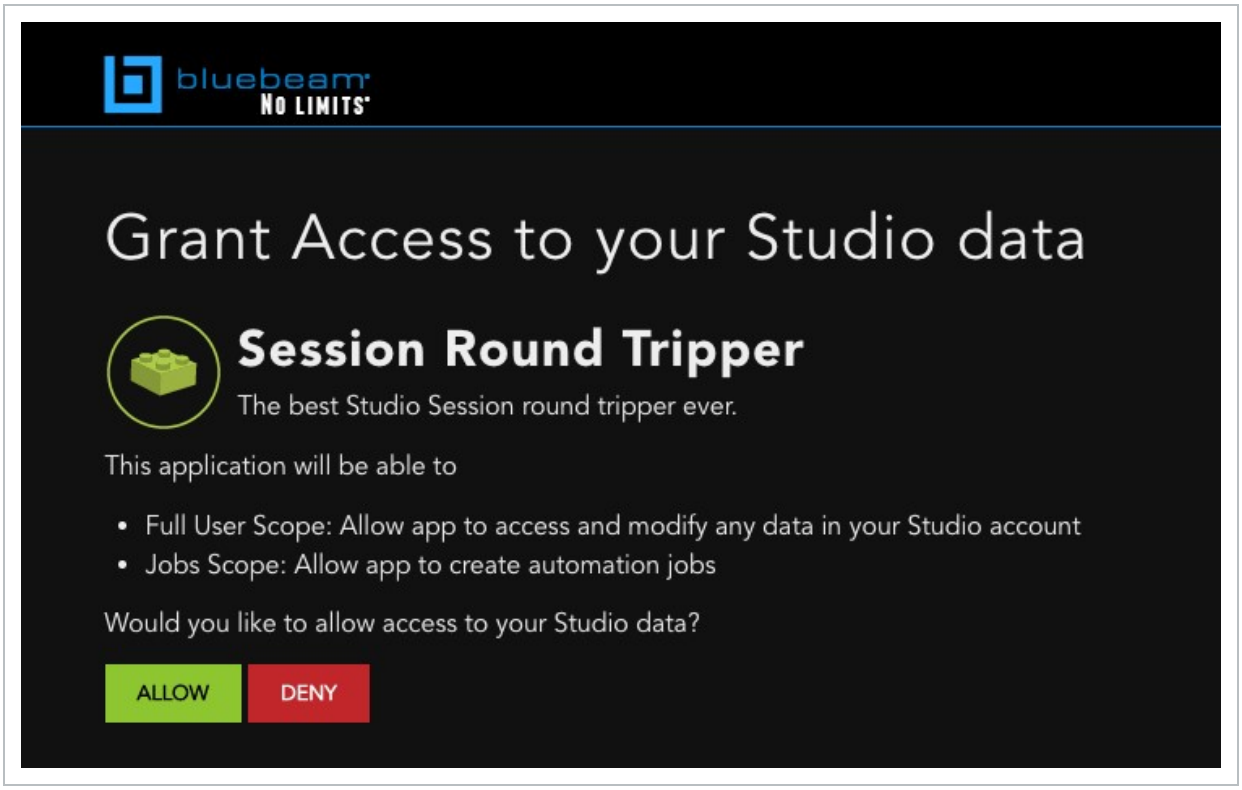


4. Log-in with your Studio account credentials.



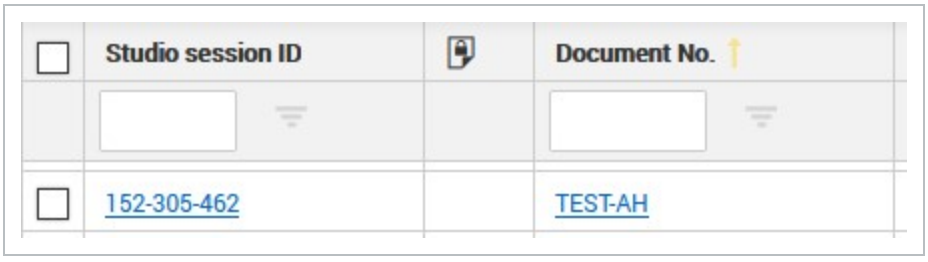
Make sure you are a Member of the Studio Prime account – use the email and password received via Bluebeam Invite.

5. In the '**Grant Access to your Studio data**' page, click **Allow**.



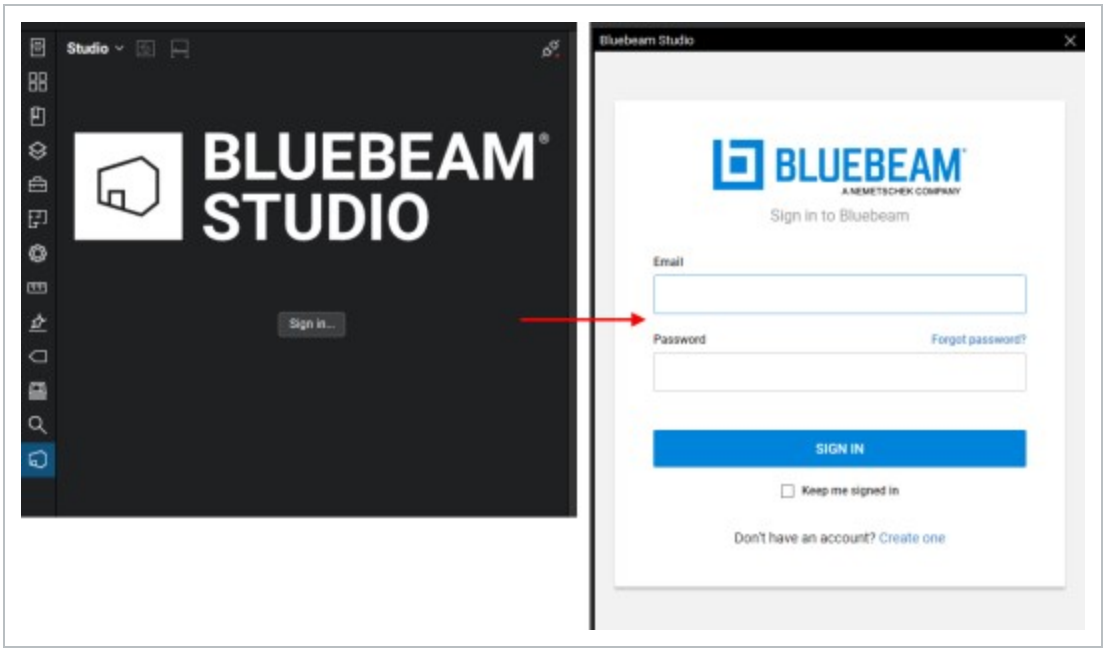
3.0.4 REVIEWING DOCUMENTS IN BLUEBEAM STUDIO

1. Ensure the reviewer has access to either **Bluebeam Revu** or **Bluebeam Vu** software and a **Bluebeam studio** account.
2. Go to the Document Review or Manage Workflow screen.
3. Click the **Studio Session ID** link against each document to directly launch the Bluebeam session.

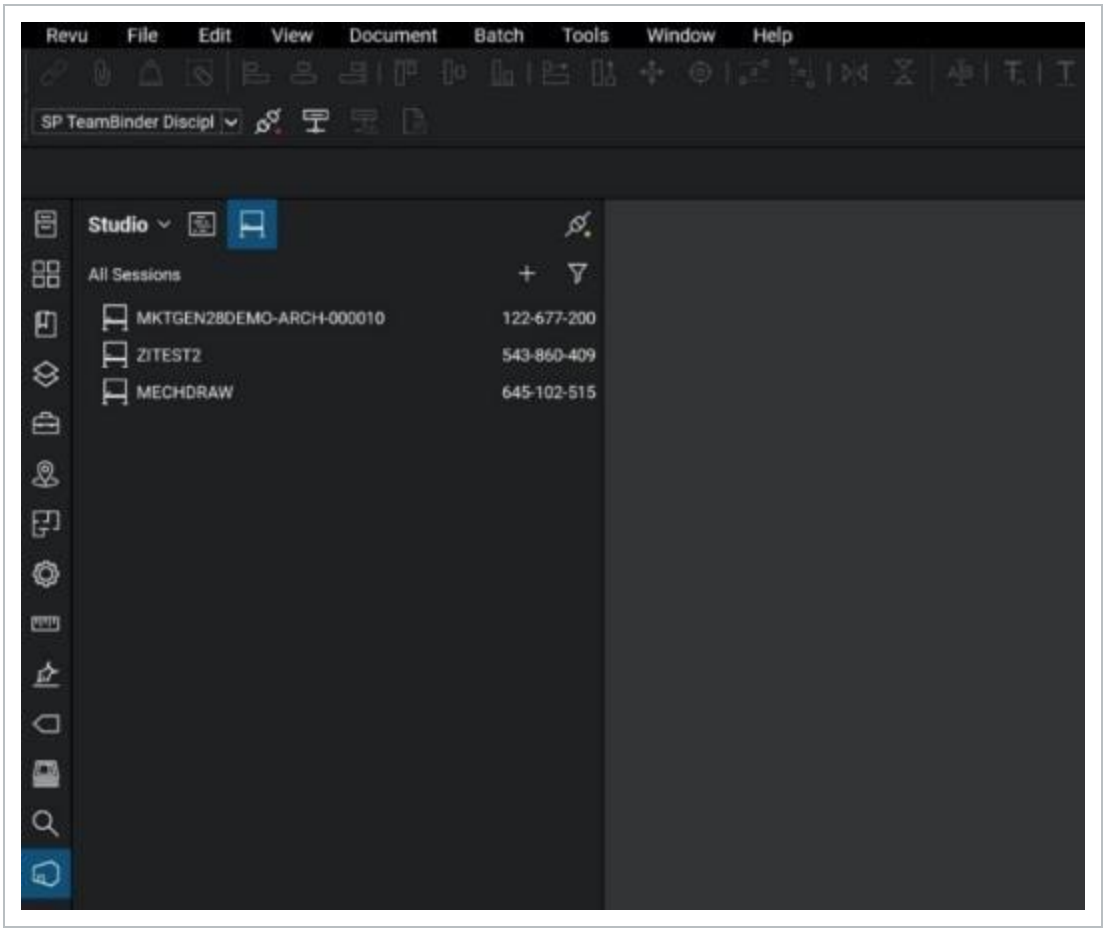


4. To connect to the project and documents that need to be reviewed, click **Sign In** and enter login

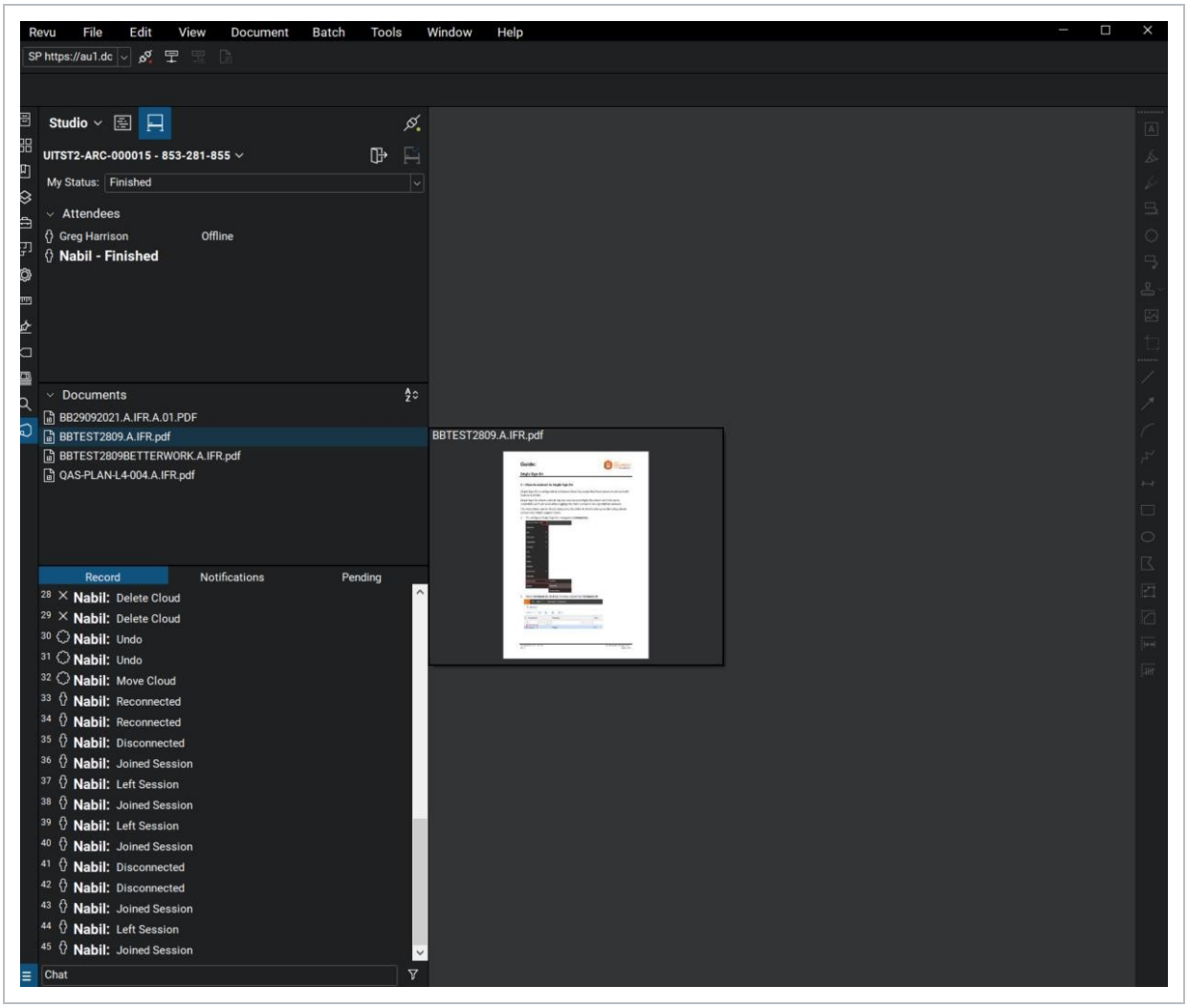
details.


Studio
BLUEBEAM
STUDIO
Sign in...
Bluebeam Studio
BLUEBEAM
A NEMETSCHEK COMPANY
Sign in to Bluebeam
Email
Password
Forgot password?
SIGN IN
Keep me signed in
Don't have an account? Create one

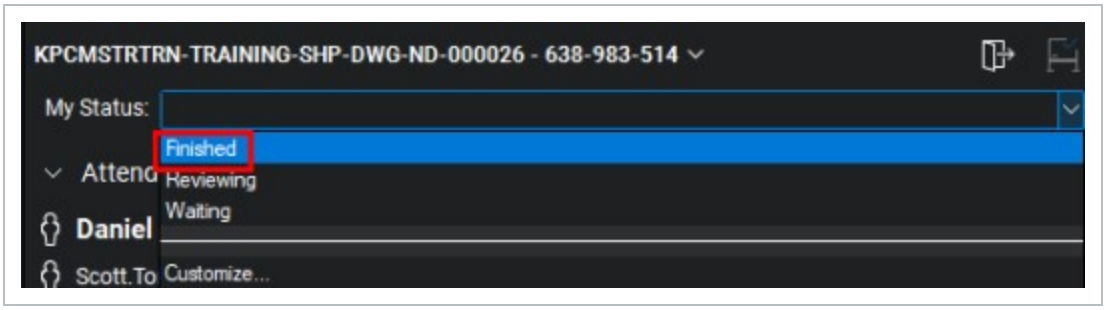
5. Once logged in, you will see a list of sessions requiring review.



6. The user can select the required PDF and start reviewing the document.



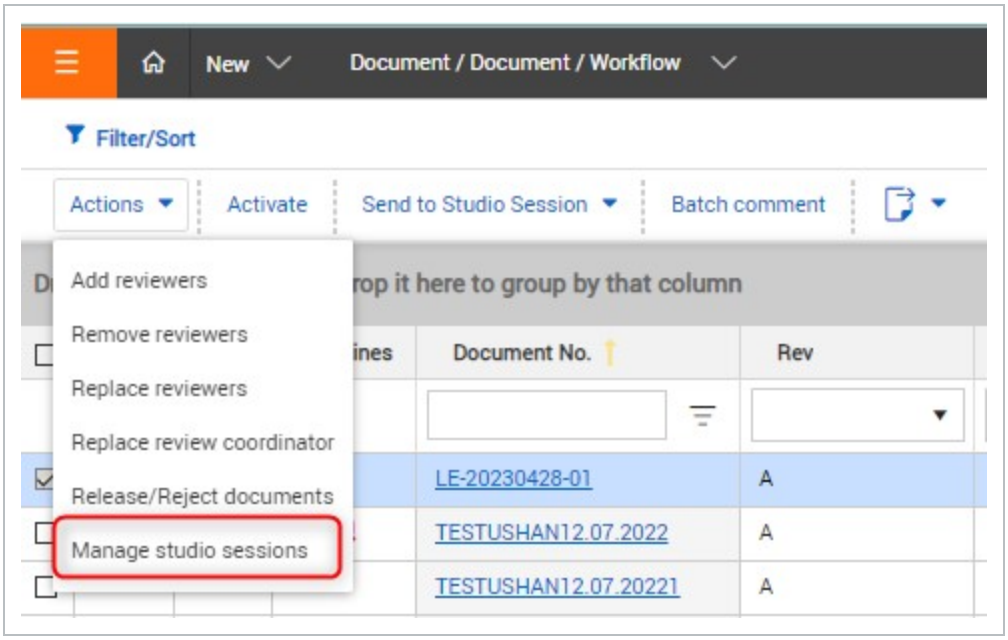
7. Reviewers can finish their reviews via Bluebeam Studio and set the status in Bluebeam as '**Finished**' once completed, this will automatically move to the next sequence of events set by the Review Initiator / Project Administrator.



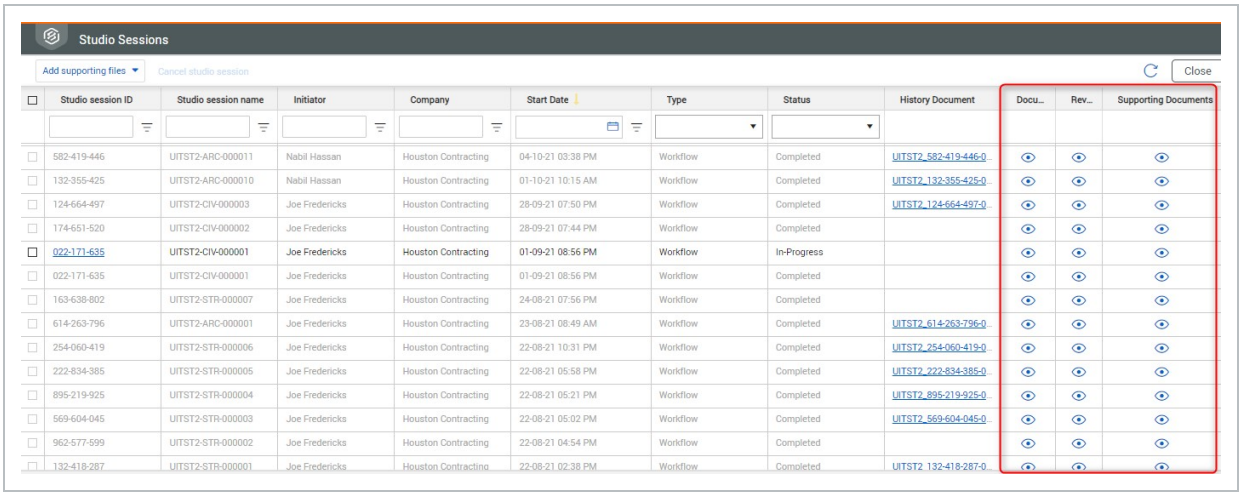
NOTE InEight Document creates a Session History Document attaching the Bluebeam Session History.

3.0.5 MANAGING STUDIO SESSIONS

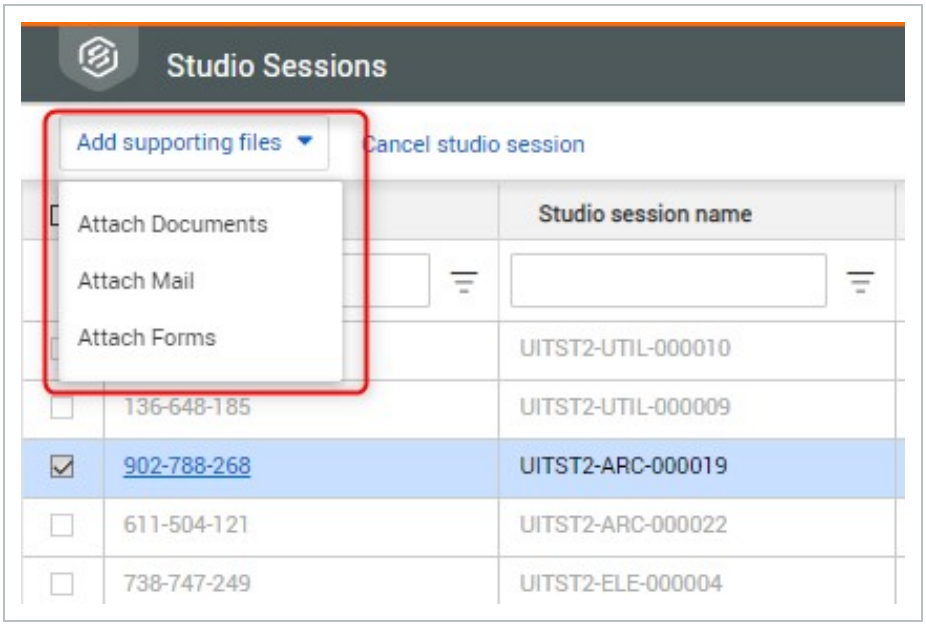
1. To manage studio session, within the **Manage workflow** register, click **Actions →Manage Studio Sessions**



2. Within **the Studio Sessions** register, a list of documents / studio sessions that are currently in progress / completed will be displayed. You will also be able to see documents, reviewers and supporting files added within the studio session.

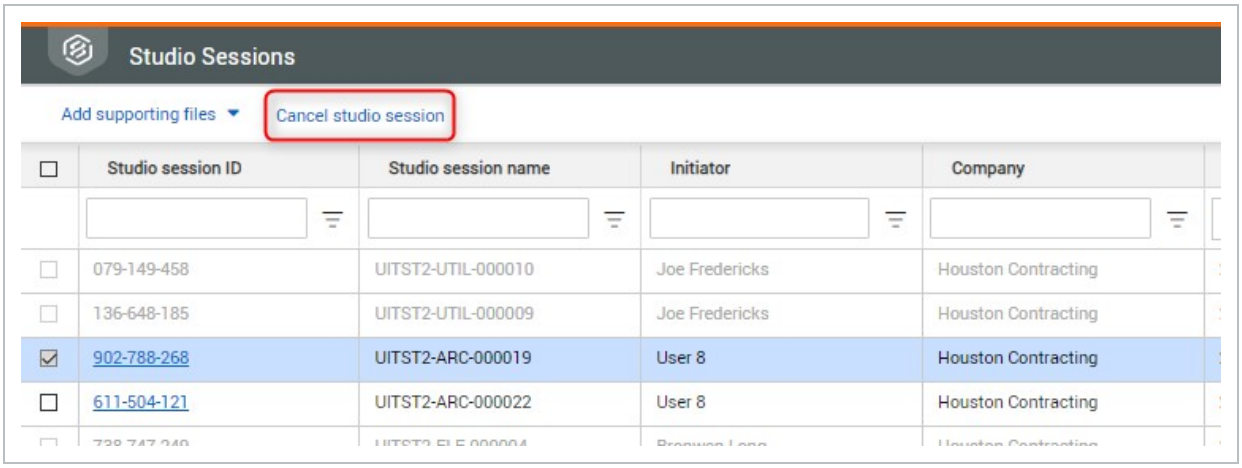


3. The Review Initiator or Project Administrator can add additional supporting InEight Document Mails, Documents, Forms, external PDFs (as PDF files) to any active Bluebeam session within the Studio Sessions register. Once supported items are added, it will be immediately visible in the Bluebeam session.

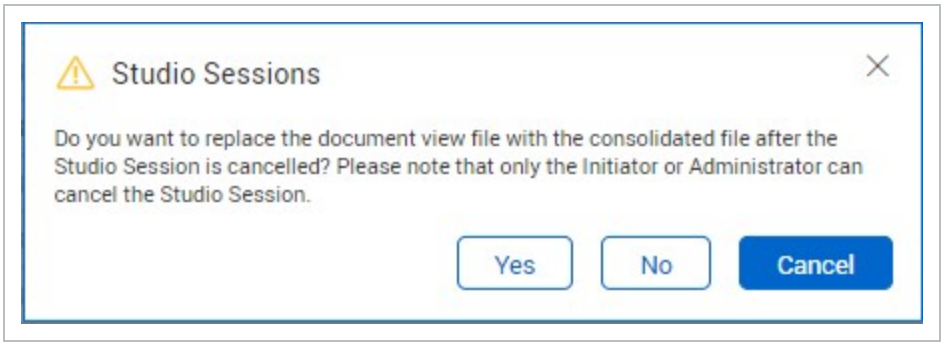


3.0.6 CANCELLING A REVIEW

1. From the Manage Workflow screen, Review in Progress, select item, click **Actions** → **Manage Studio Sessions** from the dropdown.
2. Within the Studio Sessions screen, select the Studio Session and click **Cancel studio session**.



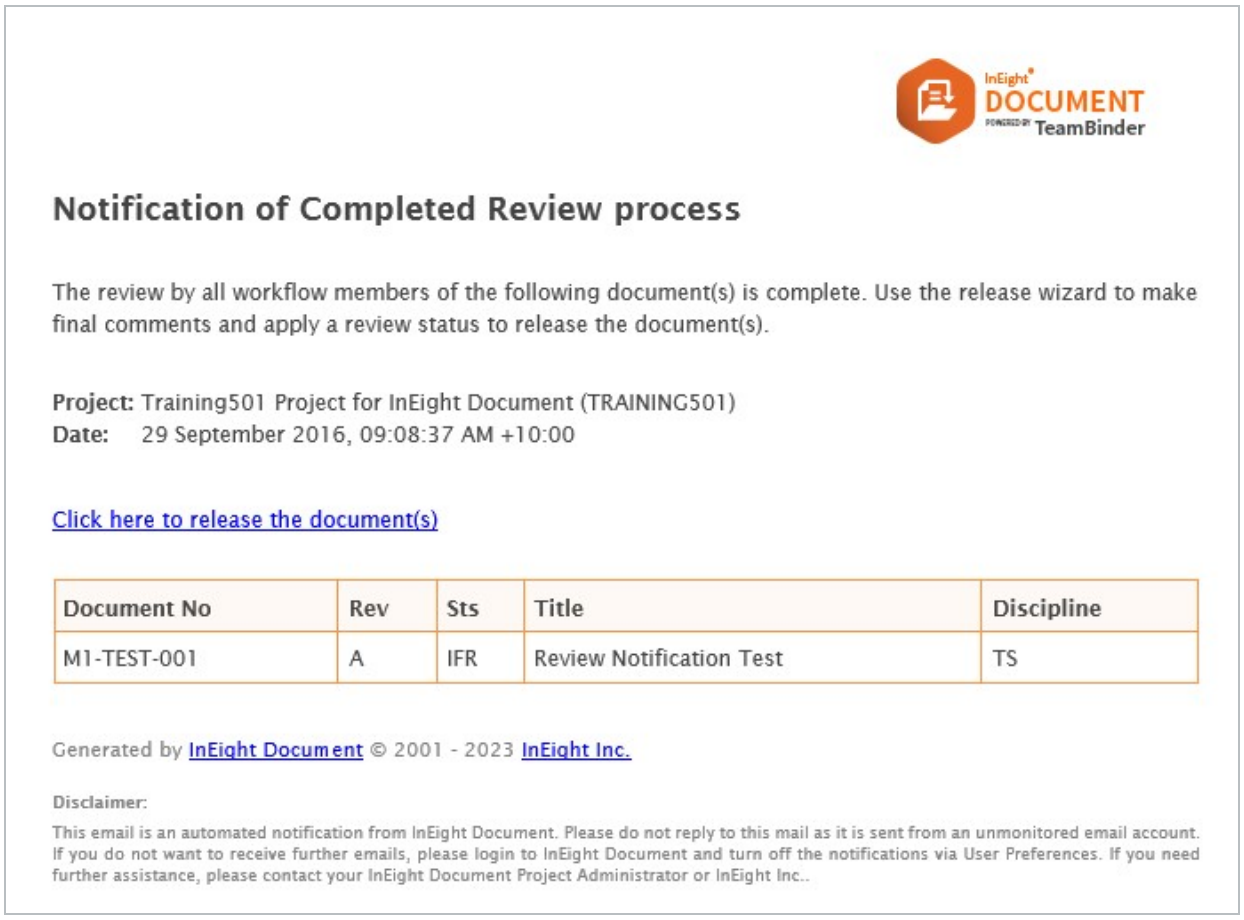
3. The system will give a prompt and remove the selected documents from the Bluebeam session accordingly.



4. Once the Bluebeam session is cancelled the review can be completed in InEight Document with the Review Coordinator.

3.0.7 RELEASING A DOCUMENT

1. Once all the reviewers have completed their review, the Review Coordinator will be notified and can complete the release in InEight Document.



InEight DOCUMENT powered by TeamBinder

Notification of Completed Review process

The review by all workflow members of the following document(s) is complete. Use the release wizard to make final comments and apply a review status to release the document(s).

Project: Training501 Project for InEight Document (TRAINING501)
Date: 29 September 2016, 09:08:37 AM +10:00

Click here to release the document(s)

Document No	Rev	Sts	Title	Discipline
M1-TEST-001	A	IFR	Review Notification Test	TS

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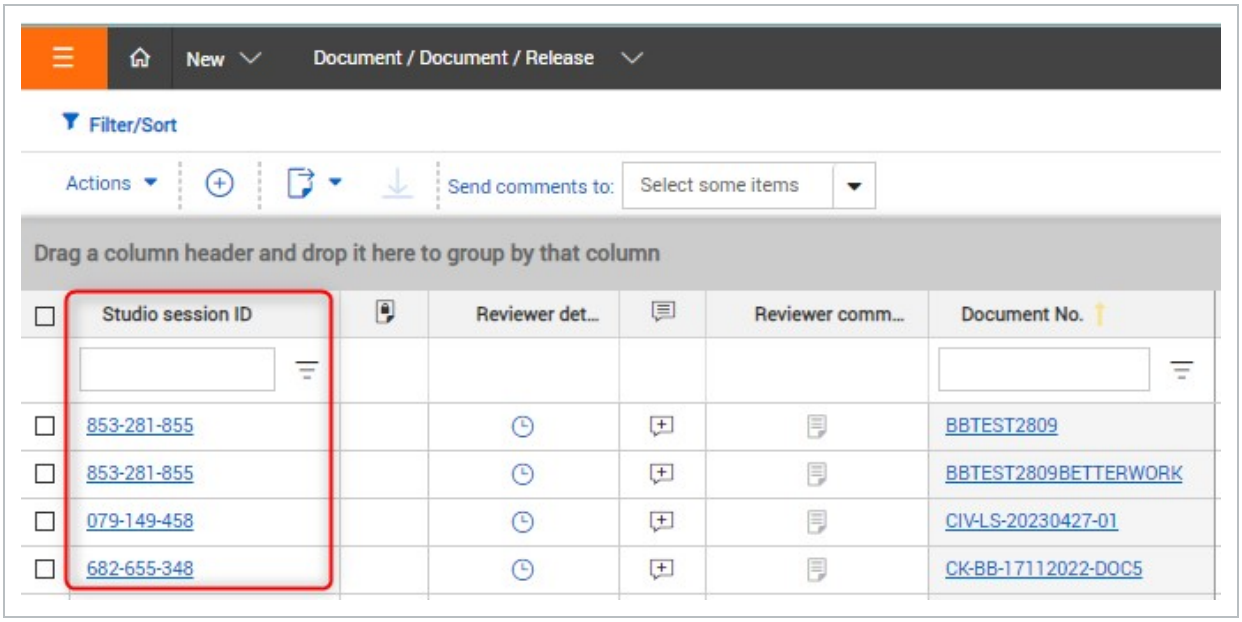
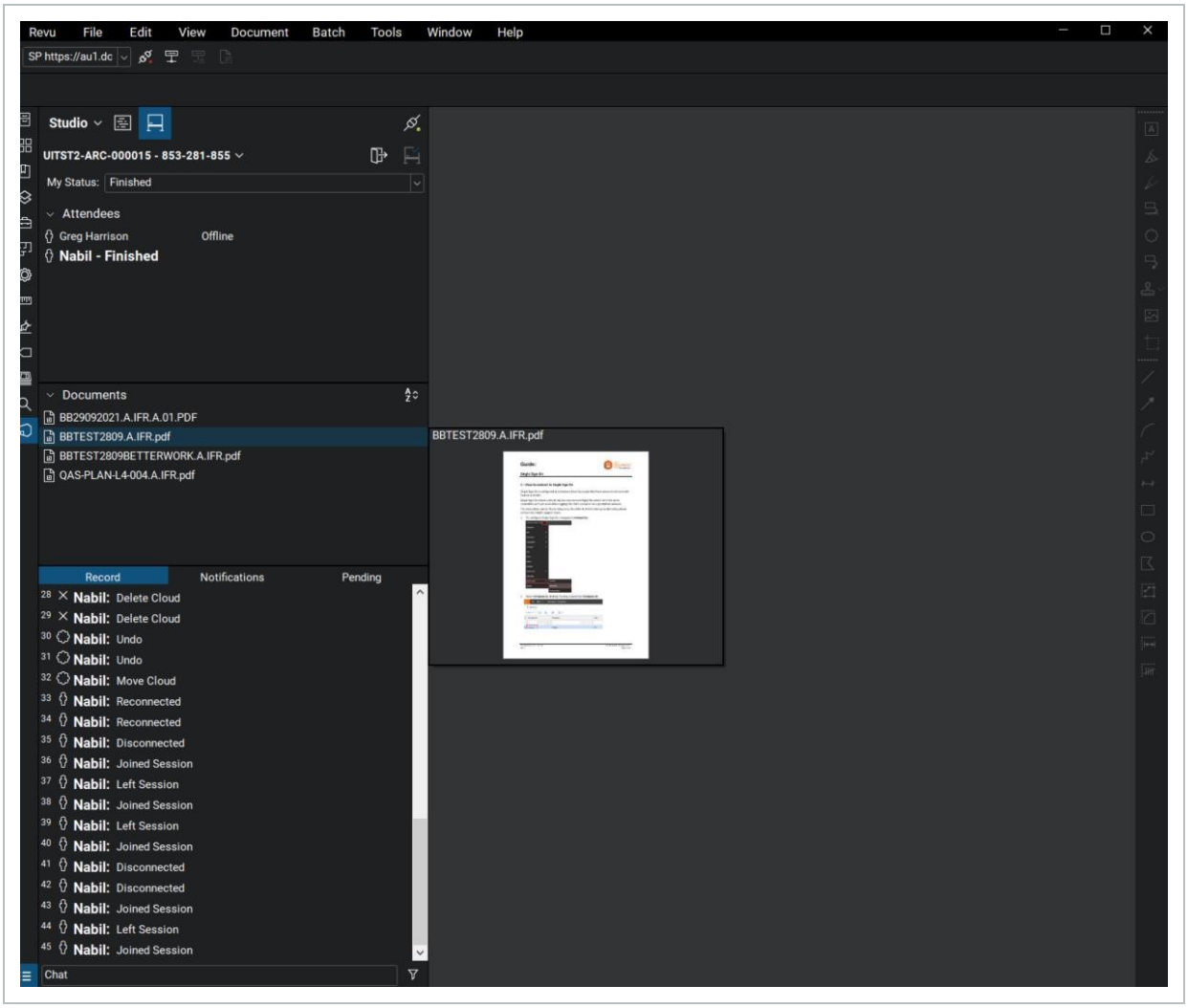
Disclaimer:

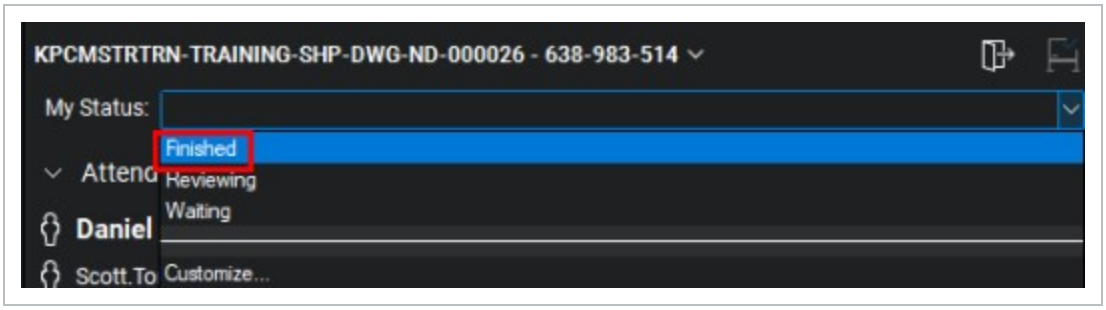
This email is an automated notification from InEight Document. Please do not reply to this mail as it is sent from an unmonitored email account. If you do not want to receive further emails, please login to InEight Document and turn off the notifications via User Preferences. If you need further assistance, please contact your InEight Document Project Administrator or InEight Inc..

2. Within the Release screen in InEight Document, the Review Coordinator can click the Bluebeam Studio session ID column to view the document in Bluebeam, review the mark-ups made by the reviewers and complete the review.


New
Document / Document / Release
Filter/Sort
Actions
Send comments to:
Select some items
Drag a column header and drop it here to group by that column
Studio session ID
Reviewer det...
Reviewer comm...
Document No.
853-281-855
BBTEST2809
853-281-855
BBTEST2809BETTERWORK
079-149-458
CIV-LS-20230427-01
682-655-348
CK-BB-17112022-DOC5



3. The Review Coordinator will finish his/her review in Bluebeam by nominating a review status to release/ reject the document and return to InEight Document to assign appropriate review status to the document.



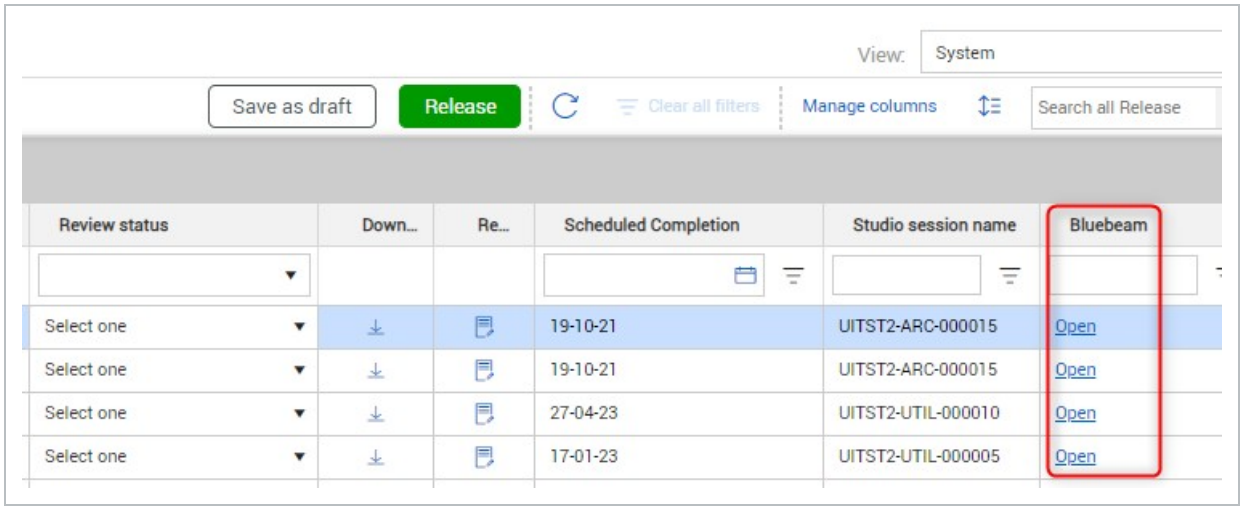
NOTE Completing the review of any documents in the session will finalise the session for all documents within the session.

4. At the time of completion, the PDF file attached to the document will be replaced with the PDF file containing the consolidated review comments from the Bluebeam session.
5. InEight Document will check out the document with a comment “Document checked out pending for Bluebeam review document” (with admin account).
6. The background process will check-in the document and replace the original PDF view file (after keeping track of the original file details and a file backup) with the marked-up document.
7. A history document will be created and linked to the Document/s that were part of the Studio session.

NOTE If the documents are configured to auto complete their review/release processes based on the review duration, the corresponding Bluebeam studio sessions also will be updated accordingly.

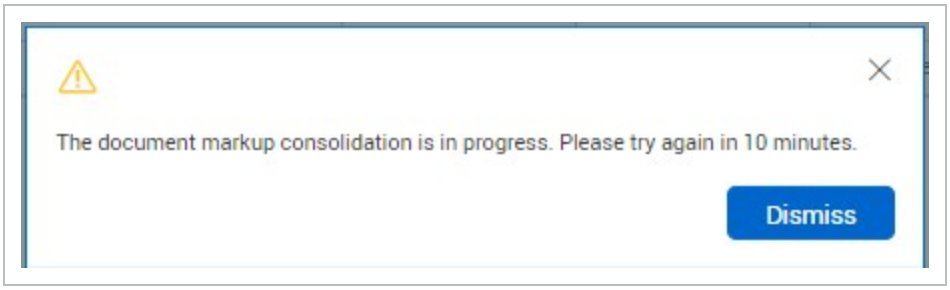
3.0.8 BLUEBEAM REVIEWS STATUS INDICATORS

1. From the **Release** screen, select **Open** in the Bluebeam column.



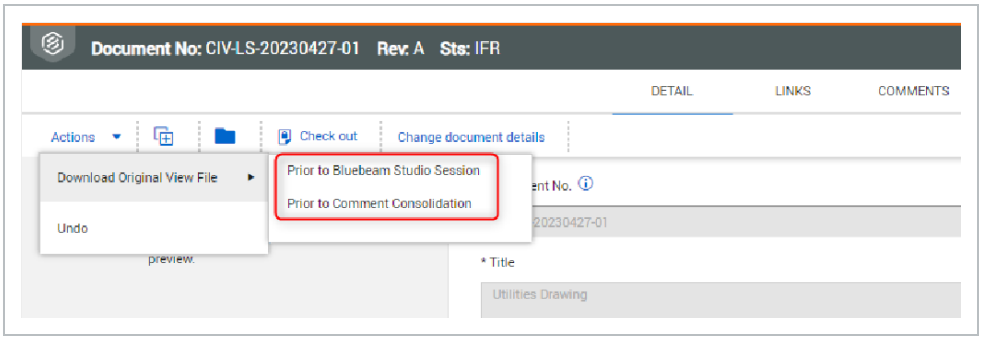
2. If the mark-up consolidation process is not complete and the document has not been returned from the Studio session, the below error message will prevent your team from prematurely consolidating comments, ensuring that comments have been transferred fully between systems

first.



3.0.9 DOWNLOADING ORIGINAL VIEW FILE

The following options are available when downloading Original View File:



1. **Download Original View File - Prior to Bluebeam Studio session** - if you use Bluebeam RevU or the 'Open' button within the release wizard to edit the PDF, changes will appear in the History Document. You will need to compare the document to see what was sent prior to the Bluebeam session i.e., the original document.
2. **Download Original View File - Prior to Comment Consolidation** - Similar to the above when a document is consolidated and released, the released document will need to be compared against the original document and will not appear on the history document.

3.0.10 DIRECT COMMENTING WITHIN THE DOCUMENT REGISTER

On a project where Bluebeam studio integration is enabled for document review process, users can do ad-hoc reviews/commenting directly from document register for PDF files using Bluebeam studio session. This option can be used for unrestrained documents and for any released documents where the project setting allows adding comments post review and release.

CHAPTER 4 – USING BLUEBEAM REVU

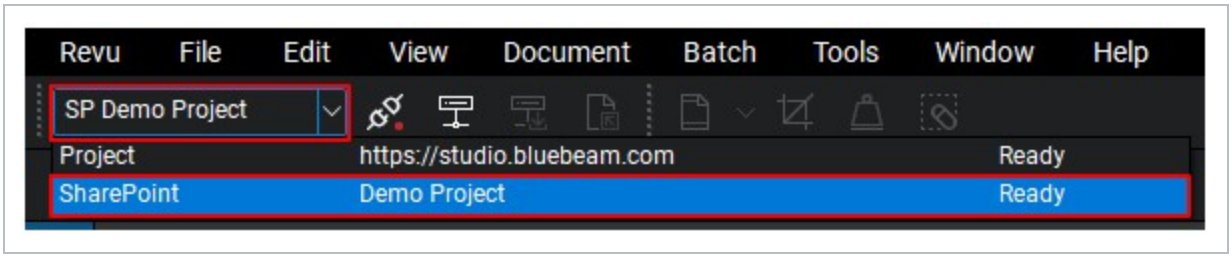
Bluebeam RevU enables you to make ad-hoc markup and change the document version rather than changing the revision of the document.

Note that the option Versioning must also be enabled to use Bluebeam RevU. Refer to section 2.2 to link Bluebeam with InEight Document.

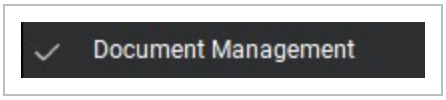
If your project is not set up to have a review workflow, it enables you to carry-out markup on unrestrained document. The option 'Enable redlining and comments on unrestrained documents' must be enabled via Project Settings.

4.0.1 CONNECTING TO AN INEIGHT DOCUMENT PROJECT

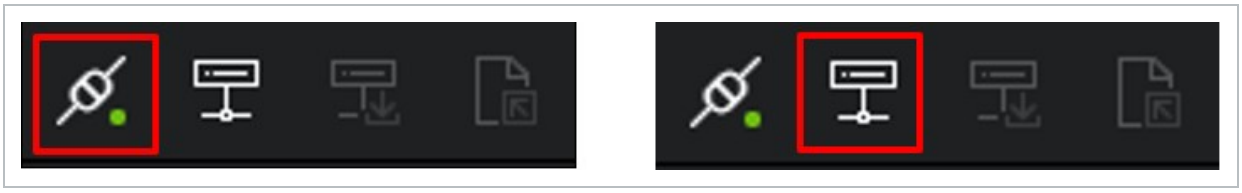
1. Click the drop-down option from the top left toolbar in Bluebeam and select a project.



2. If this dropdown is not available, right click on the toolbar and select Document Management.

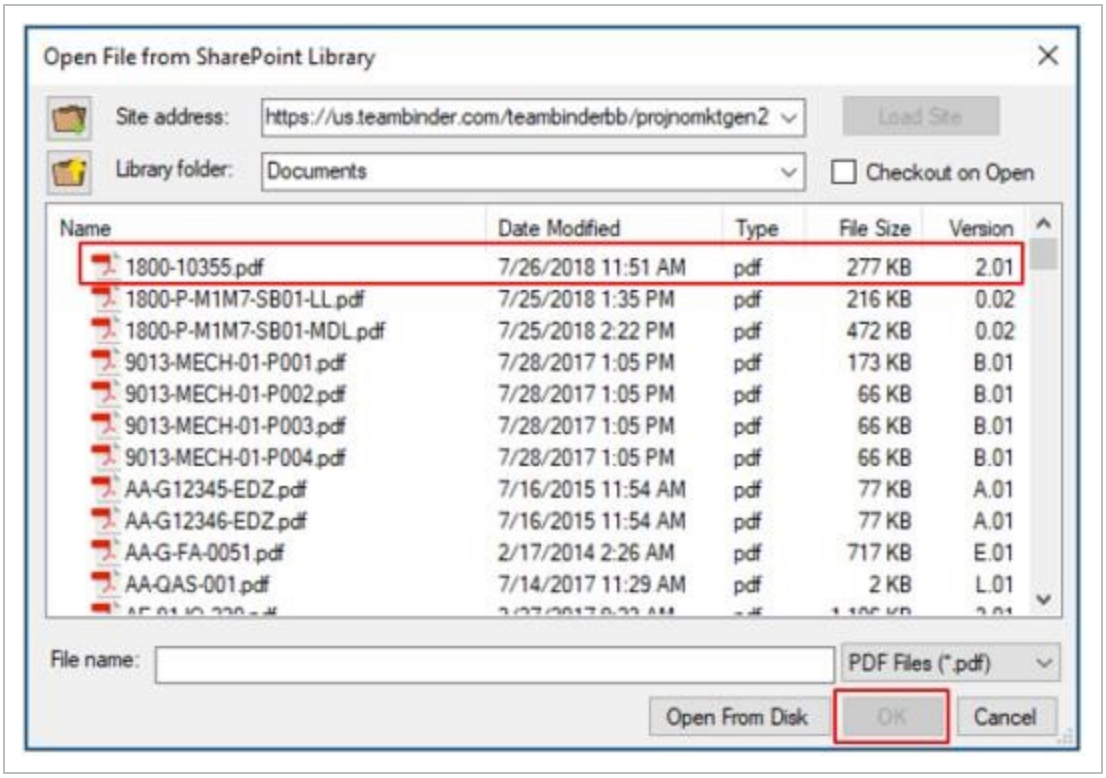


3. Click the power plug icon next the dropdown to connect. Using single sign on (if enabled) will connect the user and provide them with an alternate icon (both plugs joined together and a green circle) which indicates the user is connected to the project.



4. Click on the Open File icon
5. Choose the Documents folder. This provides a list of all accessible PDF files and details, including the document number (Name field), date last modified and current revision/version (Version field).

- In this example below, document A-R-101 is at version 02.01 (the first version of revision 2).
- To open the required PDF file, select the document then click **OK**.

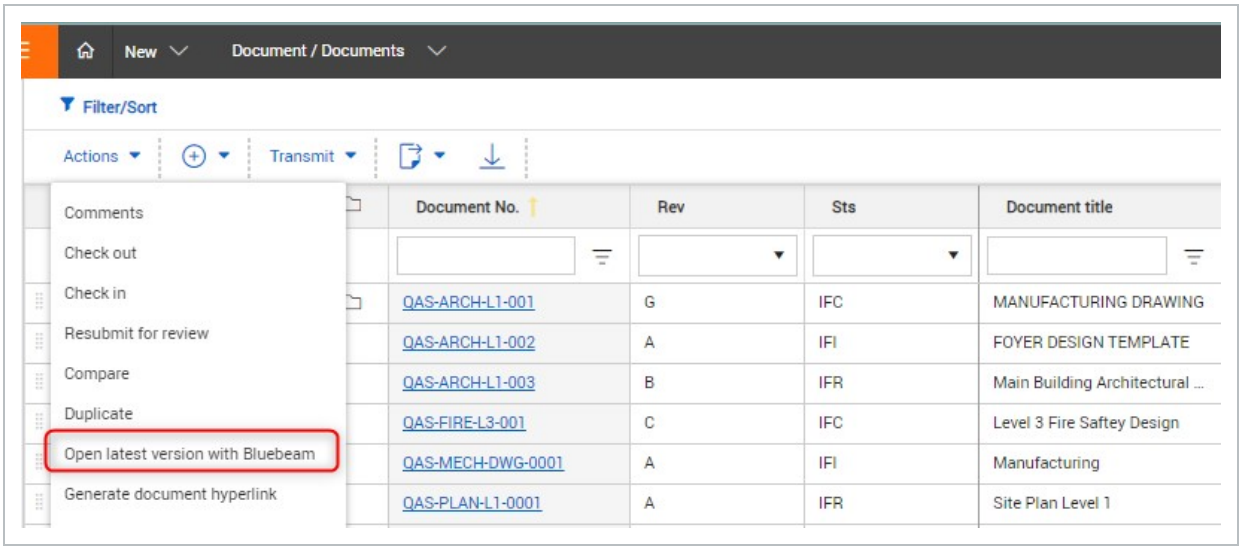


4.0.2 LAUNCHING BLUEBEAM REVU FROM INEIGHT DOCUMENT

1. In the Document Register, locate the document you wish to open with Bluebeam.
2. To **Open Latest Version with Bluebeam** – Select the document → click on **Actions** → Open **Latest Version with Bluebeam.**

   Note: If you are using Google Chrome browser, you need to install ClickOnce plugint to allow

opening the document with Bluebeam. Refer to Section 2.3 for further details.



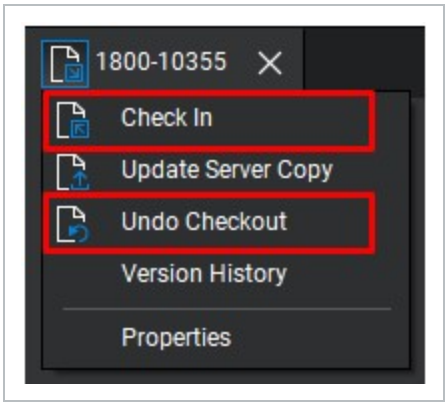
4.0.3 DOCUMENT STATUS IN BLUEBEAM

1. When a document is opened in Bluebeam, the document number is shown in the top tab along with an icon indicating whether the document is currently editable or not.

1. **Closed Padlock** – Indicates the document is locked in Bluebeam and cannot be edited. The edit functionality bar on the left side of Bluebeam will be inactive when the document is locked.
2. **Paper with Blue Arrow** – Indicates the document is unlocked in Bluebeam and can be edited. The edit functionality bar on the left side of Bluebeam will be activated when the document is unlocked.

2. When closing a document after editing it in Bluebeam choose one of the following options:
    1. **Check In** – Checks the document back into InEight Document even if no changes have been made against the document. This will increase the version number of the document in InEight Document.
    2. **Undo Check Out** – Checks the document back into InEight Document without recording any changes made against the document. This will not increase the version number of the

document in InEight Document.

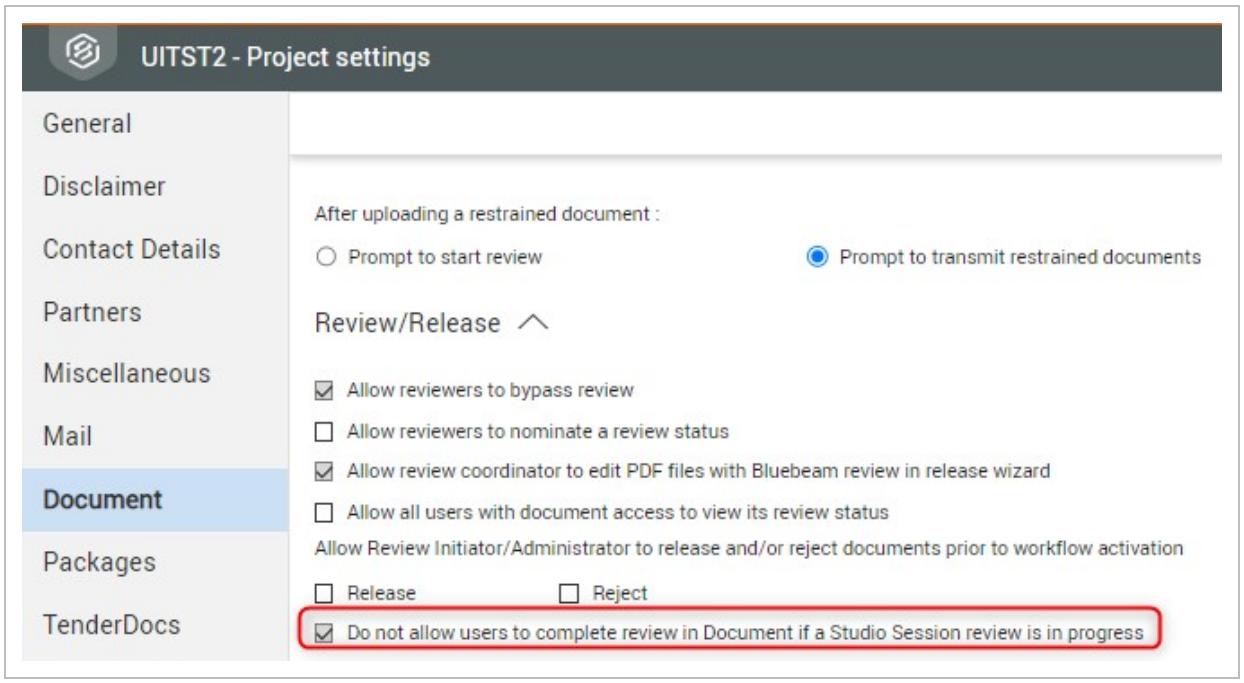


NOTE Documents can be unlocked automatically when added to Bluebeam by enabling the '**Checkout on Open**' function when adding an InEight Document project to Bluebeam.

CHAPTER 5 – BLUEBEAM SPECIFIC PROJECT SETTINGS

The following configurations are available in Project Settings:

- **Allow Review Coordinator to edit PDF files with Bluebeam review in release wizard** – this enables the review coordinator to open up the document directly in Bluebeam RevU rather than in Bluebeam Studio as it will enable to review coordinator additional functions such as deleting mark-ups added by reviewers.
- **Do not allow users to complete review in Document if a Studio Session review is in progress** – this will avoid confusion amongst the reviewers as once a studio session begins, reviewers will not be able to open up the document within InEight Document.



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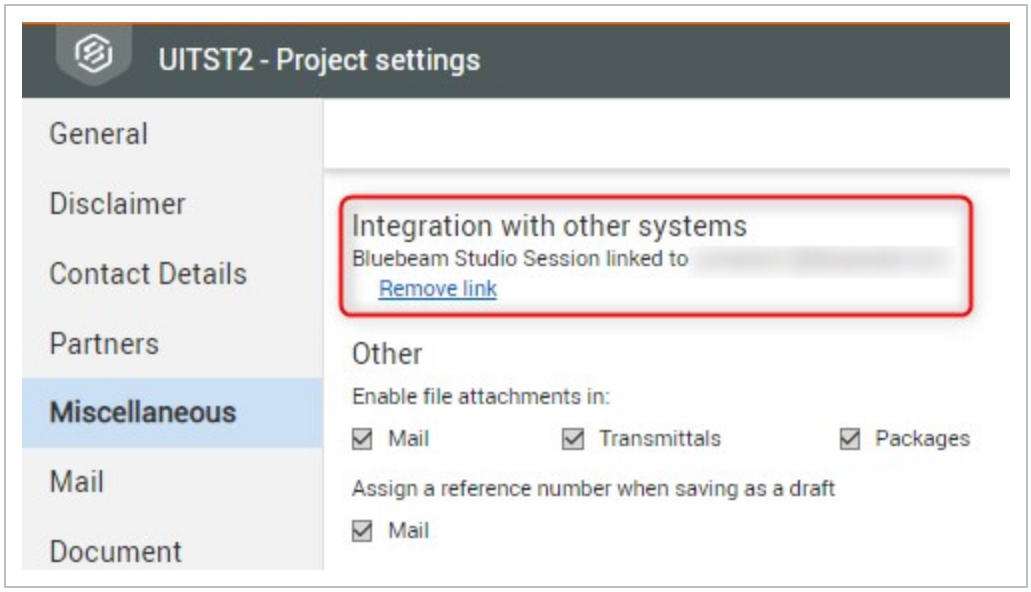
CHAPTER 6 – BLUEBEAM FREQUENTLY ASKED QUESTIONS

How do I set-up reviewing documents in Bluebeam Studio Session?

To set up Bluebeam to allow review studio sessions from Document, you'll need to set up at least two studio accounts that both have an active Bluebeam Core or Complete licenses.

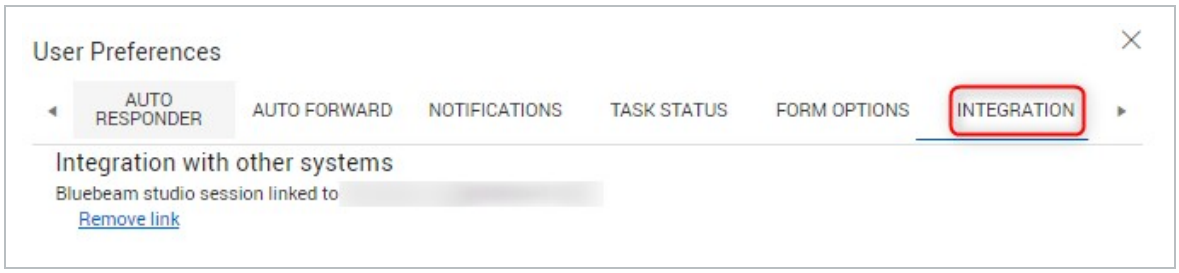
- **First Account** - A service account that is linked and set up in Project Settings → Miscellaneous tab.



The best practice would be for the customer's IT department to create a shared mailbox like bluebeam.serviceacct@company.com to be used. Someone in the customer's company will need access to this mailbox to click the link in the activation account email from Bluebeam in case the password needs to be reset. Once this has been set up, activated and Core or Complete license assigned, it can be linked to the project via the Project Settings > Miscellaneous tab.

- **Second account** - For the Review Initiator (usually the Document Controller). Additional Review Initiator will also need to have a Core or Complete licensce associated with his/her Studio Account. Reviewers do not need to have a subscription and can just be left as a free account. All the Bluebeam Studio accounts need to be under the same domain as the

company's Core or Complete license . This is almost always studio.bluebeam.com which is represented by the US flag in both Revu 2019 and 2020. Once the account is activated, and Core ore Complete license has been assigned, user can link the Studio Account to InEight Document's account via the User Preference → Integrations tab.



What email-address do I need to use when setting up my Bluebeam Studio Account?

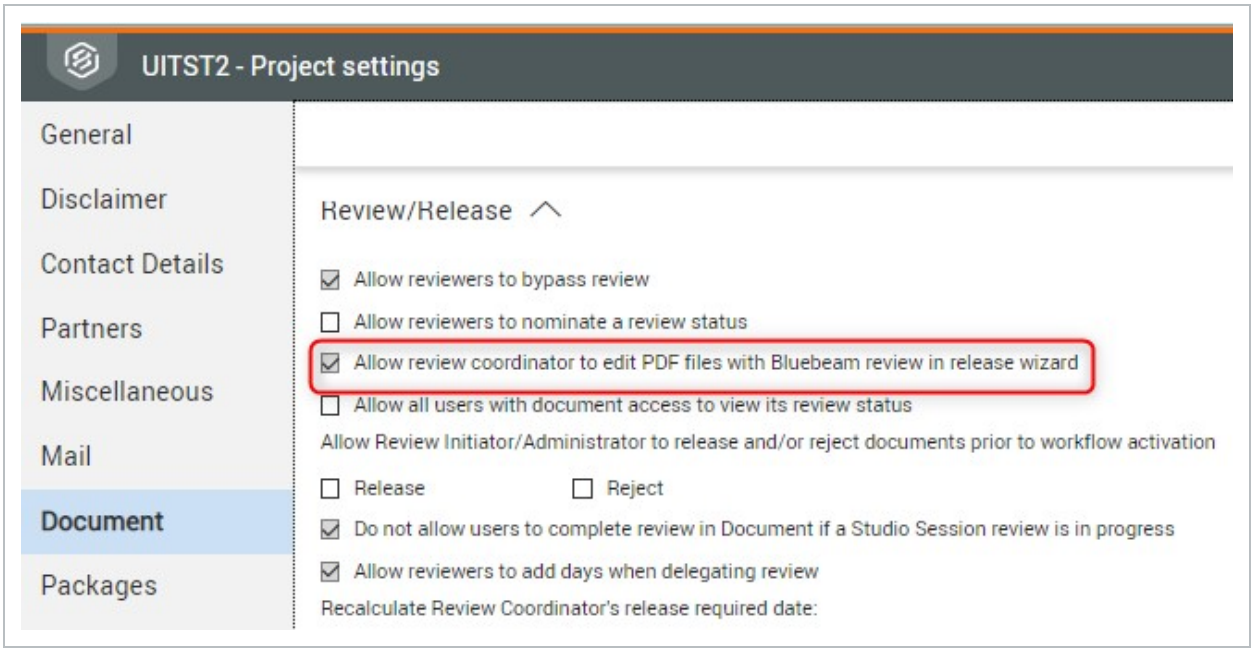
The email address for the Review Initiator and Reviewers MUST match the email address used in Document. When created, you'll get an activation email that must be completed before you can start/participate in reviews.

Is it possible to re-join the session if I have reviewed and added mark-ups to the document?

Reviewers can open a session, leave, and re-join so long as they do not change my status reason to **Finished**. Once the status has been changed to finished, the middleware will close the session for that user.

Can the Review Coordinator make changes to the marked-up PDF such as removing mark-ups before releasing the document?

Yes, the option "Allow review coordinator to edit PDF files with Bluebeam review in release wizard" in Project Settings should be enabled. If it's not enabled, the "Open" button will not be visible from the Release screen for the Review Coordinator to open the Document in Bluebeam. Opening the session via the session button only allows you to see the session data, however, the actual session is read-only at this point, and the Review Coordinator cannot change anything.



Do I need to open Bluebeam RevU and sign into the project before trying to open the document from the Register in Bluebeam?

No, InEight Document will automatically open Bluebeam and will provide the login box for standard users, or automatically log the user in if using SSO and open the document.

When I click “Open latest version with Bluebeam” it doesn’t do anything, why is that so?

The ClickOnce extension is required when using Google Chrome browser and it might not be installed. Refer to section 2.3 for further details.

Why is the review status in InEight Document not updated even though reviewers have change status to Finished and left the session?

It can take a few minutes for the middleware to update the document, or it could take a few seconds. If it's been longer than an hour, please contact InEight Support team for assistance.

As a Review Coordinator, I cannot check-in a reviewed document after making changes in Bluebeam RevU, why is that so?

The document needs to be saved first prior checking in the document.