

---

**BLUEBEAM USER  
GUIDE**

**DOCUMENT MANAGEMENT**

**INEIGHT** 

Information in this document is subject to change without notice. Companies, names and data used in examples are fictitious.

Copyright ©2024 by InEight. All rights reserved. No part of this document may be reproduced or transmitted in any form or by any means, electronic or mechanical, for any purpose, without the express permission of InEight.

Microsoft Windows, Internet Explorer and Microsoft Excel are registered trademarks of Microsoft Corporation.

Although InEight Document has undergone extensive testing, InEight makes no warranty or representation, either express or implied, with respect to this software or documentation, its quality, performance, merchantability, or fitness for purpose. As a result, this software and documentation are licensed “as is”, and you, the licensee are assuming the entire risk as to its quality and performance. In no event will InEight be liable for direct, indirect, special, incidental or consequential damages arising out of the use or inability to use the software or documentation.

Release 23.12

Revision: 5

Last Updated: 08 February 2024

# CONTENTS

<b>CHAPTER 1 – INTRODUCTION TO BLUE BEAM INTEGRATION .....</b>	<b>5</b>
1.1 Business Process Overview .....	5
1.2 Requirements .....	5
1.3 Linking Bluebeam with InEight Document .....	6
1.4 Connecting to an InEight Document Project .....	10
1.5 Opening InEight Document Documents in Bluebeam .....	10
1.6 Document Status in Bluebeam .....	11
<b>CHAPTER 2 – INTRODUCTION TO BLUEBEAM DOCUMENT REVIEW .....</b>	<b>13</b>
2.1 Setting up the bluebeam review process .....	13
2.2 Manage Document Review Screen .....	14
2.3 Reviewing Documents in Bluebeam .....	17
2.3 Step by Step 1 – Review documents in Bluebeam .....	17
2.4 Reviewing Documents in Bluebeam Studio .....	17
2.5 Cancelling a Review .....	19
2.6 Releasing a Document .....	19
2.7 Auto Completion of Review/Release .....	20
2.8 Status Indicator & Lock for Bluebeam Reviews .....	20
<b>CHAPTER 3 – BLUEBEAM SPECIFIC PROJECT SETTINGS .....</b>	<b>21</b>
<b>CHAPTER 4 – DIRECT COMMENTING WITHIN THE DOCUMENT REGISTER .....</b>	<b>23</b>

*This page intentionally left blank.*

# CHAPTER 1 – INTRODUCTION TO BLUEBEAM INTEGRATION

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

## 1.1 BUSINESS PROCESS OVERVIEW

Bluebeam is an industry standard similar to Adobe Acrobat Pro 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 InEight Document and Bluebeam’s PDF management capabilities.

## 1.2 REQUIREMENTS

To start Bluebeam functionality in InEight Document, 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
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 (that is, 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	Studio Prime license is required when using Bluebeam	Client

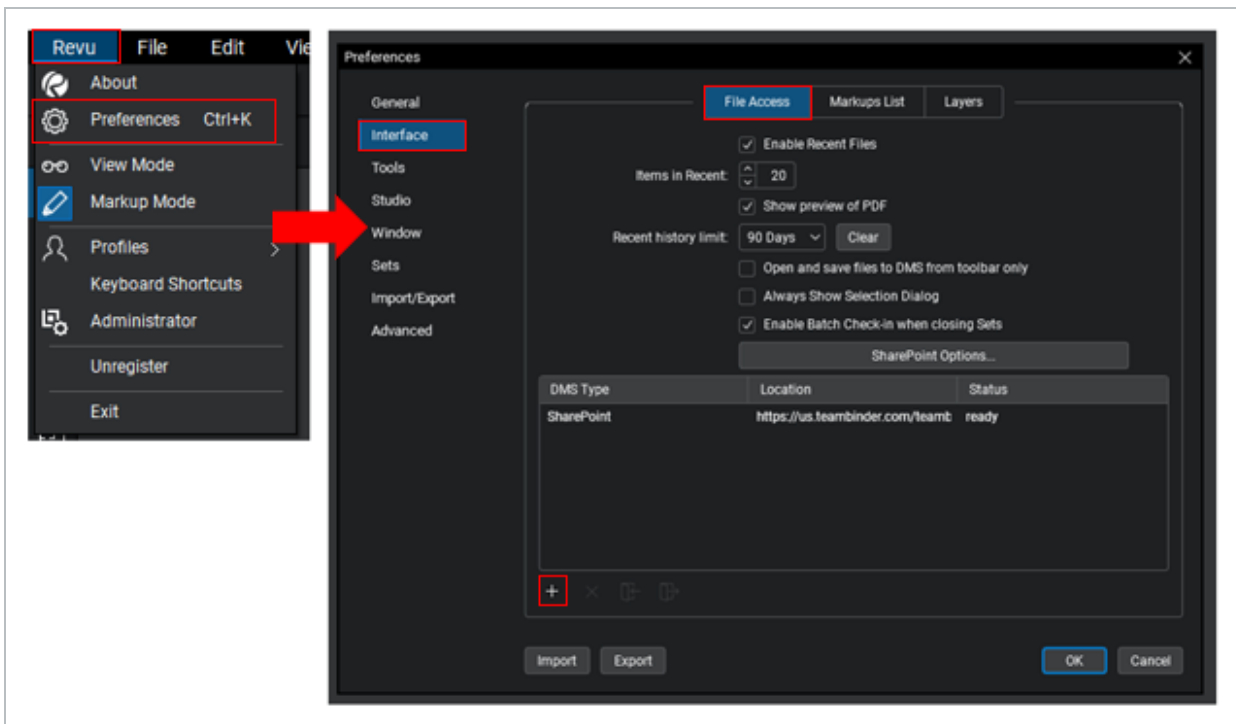
Function/Items required	Purpose	Responsible party
	<p>Studio.</p> <ol style="list-style-type: none"> <li>1. <b>Service Account</b> - To facilitate the bridge between InEight Document and Bluebeam, this service account cannot initiate any documents. For example, bbintegration@ineight.com .</li> <li>2. <b>Review Initiator</b> - Each Review initiator will be an additional account on the Bluebeam portal.</li> </ol>	
	<p><b>NOTE</b> A minimum of two licenses is required. The review initiator and the service account cannot be the same</p>	

## 1.3 LINKING BLUEBEAM WITH INEIGHT DOCUMENT

Bluebeam connects with InEight Document using Bluebeam’s SharePoint integration capabilities.

### To link Bluebeam to InEight Document:

1. Click **Settings** and select **Preferences**.
2. In the **Interface** tab, select **File Access**.
3. Click the **plus (+) icon** to select the InEight Document projects you want to link to Bluebeam.



4. In the Site field, enter your project's URL using the following format:  
<https://www.teambinder.com/TeamBinderADFS/PROJNOVPDEMO/>
  - a. **www.teambinder.com** – replace this with your server name.
  - b. **VPDEMO** – replace this with your project number.

**Add Document Management System** [X]

Type: SharePoint

Site: http://

Site Display Name:

Default Library:

Login Name:

Password:

Checkout on Open

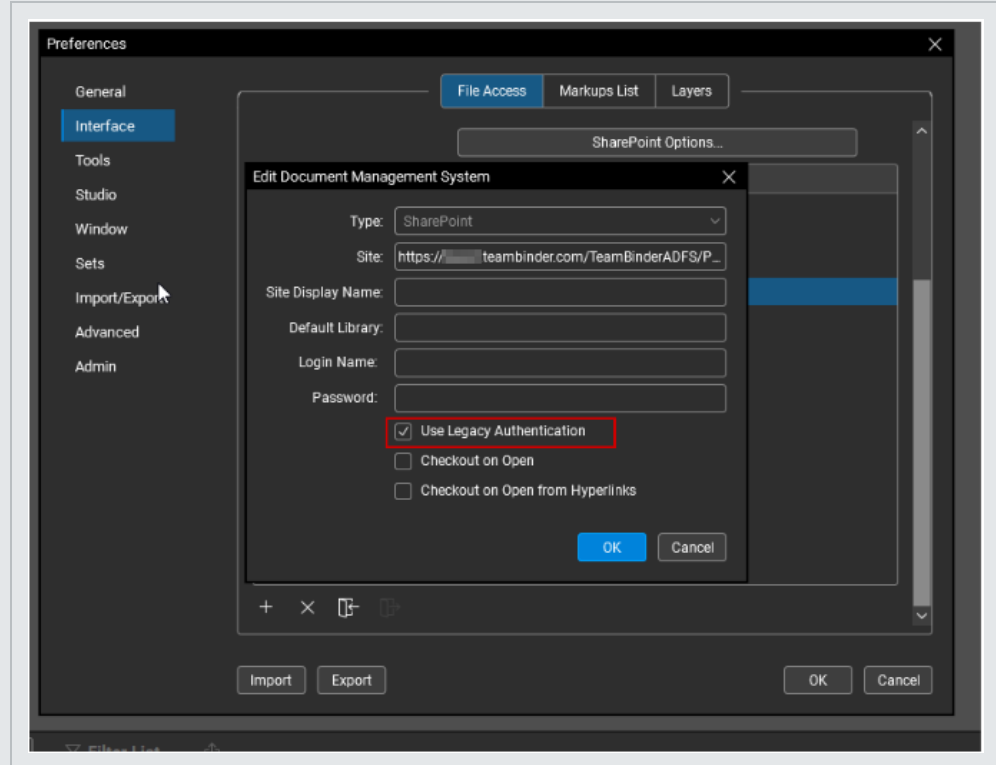
Checkout on Open from Hyperlinks

OK Cancel



**NOTE**

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



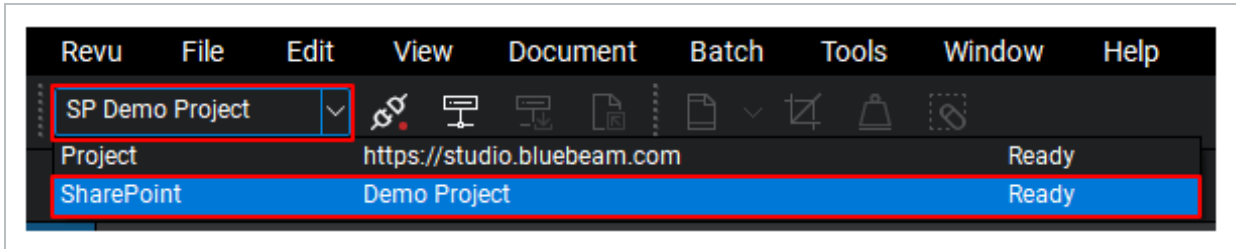
5. Select the PDF files of the required documents.
6. Select **Checkout on Open** (as shown above) to enter editing mode after the document is opened in Bluebeam.

**NOTE**

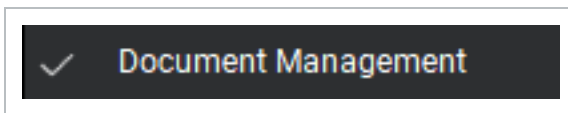
- If your company is not using Active Directory Single Sign on. The URL will be <https://www.teambinder.com/TeamBinderBB/PROJNOVPDEMO>
- To further sort this document list by field (e.g. ‘Disciplines’ & ‘Type’); specify a direct path within the **Site** field. For example:  
<https://www.teambinder.com/TeamBinderADFS/PROJNOVPDEMO/Discipline/Type>

## 1.4 CONNECTING TO AN INEIGHT DOCUMENT PROJECT

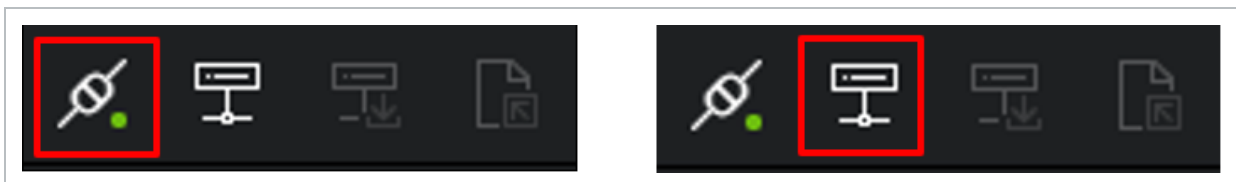
1. Click the drop down option from the top left toolbar in Bluebeam and select a project.



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



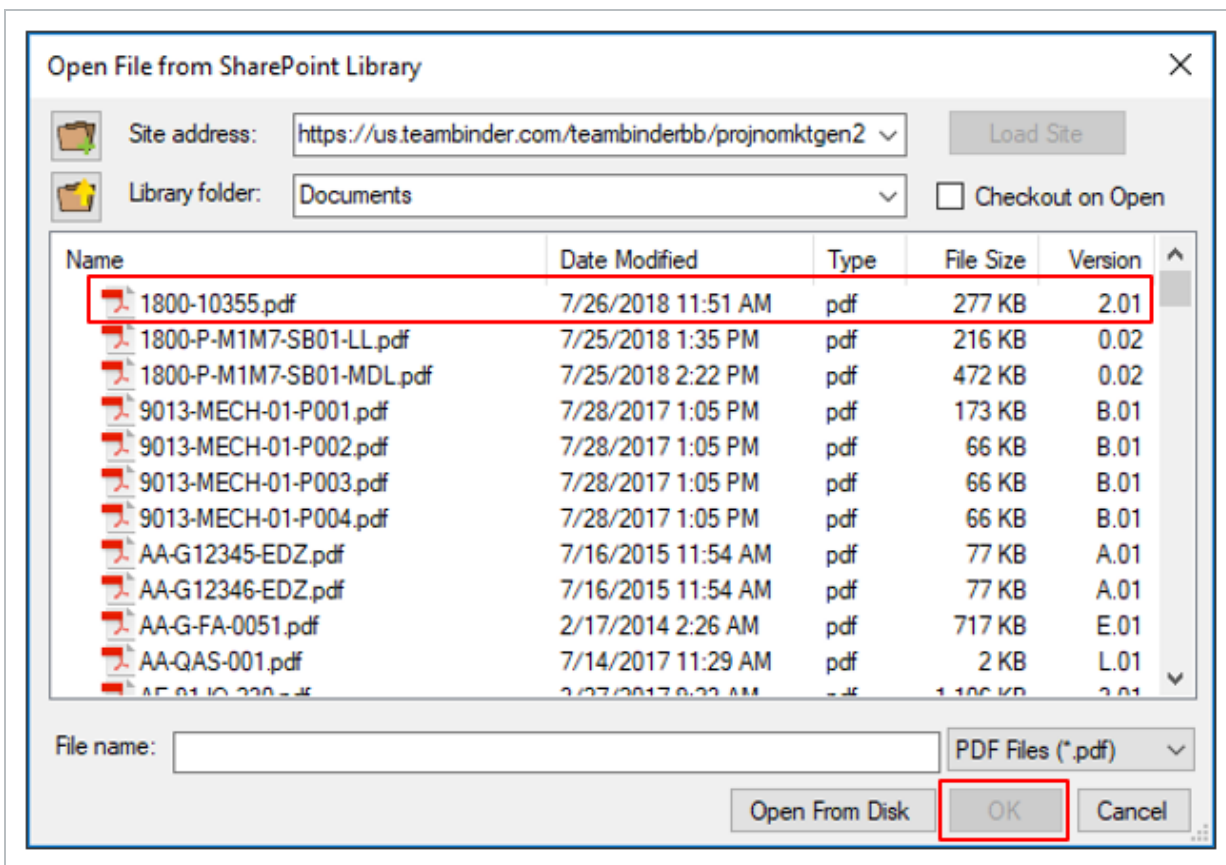
3. Click the power plug icon next the dropdown to connect. Using single sign on (if enabled) will connect the user and provide them with an alternate icon (both plugs joined together and a green circle) which indicates the user is connected to the project.



## 1.5 OPENING INEIGHT DOCUMENT DOCUMENTS IN BLUEBEAM

1. Select the **Open File (DMS)** button.
2. Choose the Documents folder. This provides the user with a list of all accessible PDF files and details, including the document number (Name field), date last modified and current revision/version (Version field).

- 3. In this example below, document A-R-101 is at version 02.01 (the first version of revision 2).



- 4. To open the required PDF file, select the document then click **OK**.

## 1.6 DOCUMENT STATUS IN BLUEBEAM

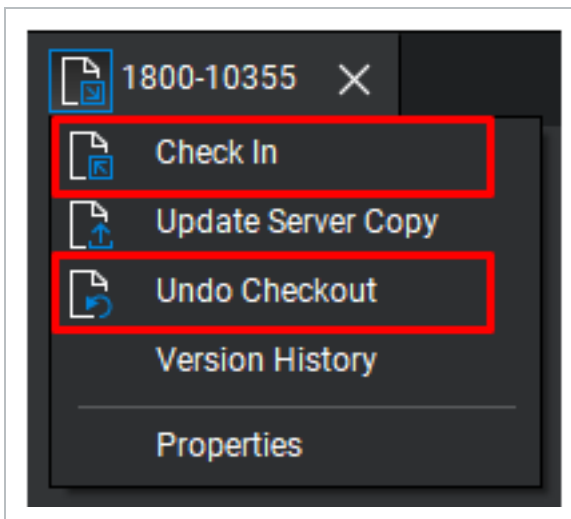
- 1. When a document is opened in Bluebeam, the document number is shown in the top tab along with an icon indicating whether the document is currently editable or not.



- 2. 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.
- 3. 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.

4. When closing a document after editing it in Bluebeam choose one of the following options:
5. 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.
6. 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 2 – INTRODUCTION TO BLUEBEAM DOCUMENT REVIEW

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

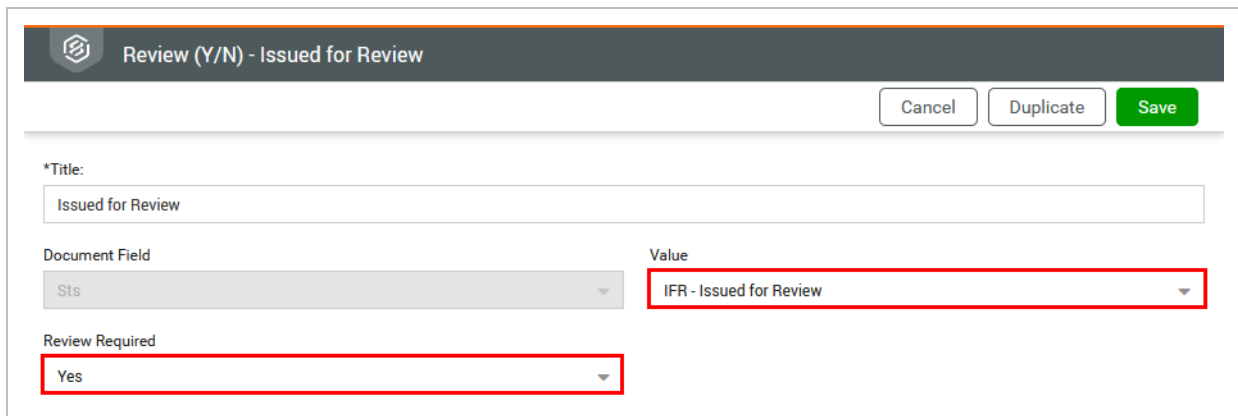
## 2.1 SETTING UP THE BLUEBEAM REVIEW PROCESS

The InEight Document default review process allows users to; view and mark-up PDF and other file formats using TeamView, make text comments, and attach external files related to comments.

With Bluebeam Studio’s integrated review process, however, Bluebeam Studio Sessions are used instead of TeamView to review PDF files. 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.



The screenshot shows a configuration window titled "Review (Y/N) - Issued for Review". At the top right are buttons for "Cancel", "Duplicate", and "Save". Below the title bar, there is a text input field for "\*Title:" containing "Issued for Review". Underneath, there are two dropdown menus: "Document Field" set to "Sts" and "Value" set to "IFR - Issued for Review". Below these is a "Review Required" dropdown menu set to "Yes". Red boxes highlight the "Value" and "Review Required" dropdowns.

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.

The screenshot shows a form titled "Review initiator - ARCH AB". At the top right, there are three buttons: "Cancel", "Duplicate", and "Save". The form contains the following fields:

- \*Title: ARCH AB
- Document Field: Discipline (Value: ARCH - Architectural)
- Document Field: Sts (Value: IFR - Issued for Review)
- \*Review initiator:  User  Role
- \*Review initiator company: Houston Contracting
- \*Review initiator contact: Joe Fredericks
- Automatically activate review workflow: No

At the bottom left, it says "© 2021 InEight Inc. | v 20.07.07". At the bottom right, the "INEIGHT" logo is displayed.

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

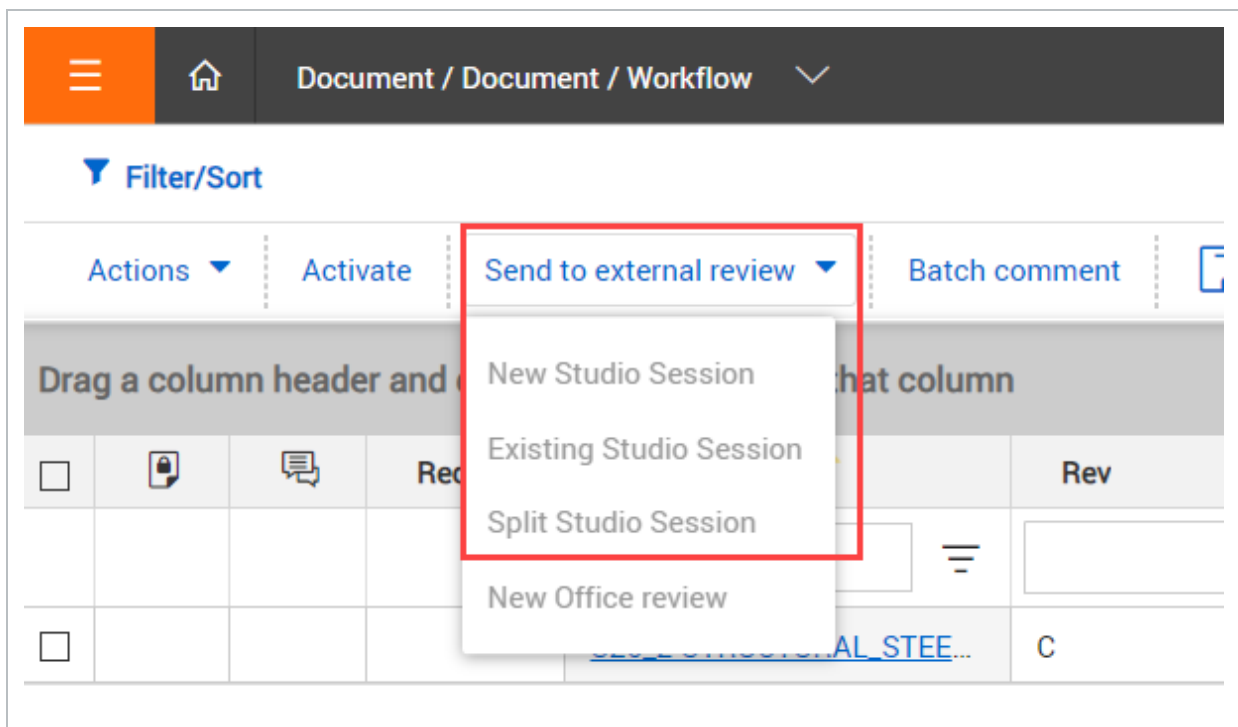
Reviewers can also use InEight Document to complete the document review but this will also complete the review in Bluebeam. This may be required to markup alternative view file formats during the review.

## 2.2 MANAGE DOCUMENT REVIEW SCREEN

The 'Manage Document Review' screen allows the Review Initiator to quickly sort / search the necessary documents, select them together 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 Document Review' register.

A Bluebeam Review button has also been added to the 'Manage Document Workflow' screen with two options:

1. New Session — displays a screen with the proposed Bluebeam session name in an editable textbox. By default, this session name will be created based on attributes configured via Project Settings. If multiple files are selected, the first selected document will be used to create the 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.



### New Bluebeam Studio Session ✕

**\*Studio Session name:**

TRAINING01-ARCH-000012

Cancel
Initiate Studio Session

2. Existing Session — displays a list of all current active Bluebeam sessions that are still on the first level review with a link to join the session. Clicking this link will add the previously selected documents to the session.

### Join Bluebeam Studio Session ✕

<input type="checkbox"/>	Studio session ID	Studio session name	
<input type="checkbox"/>	547-065-074	TRAINING01-ARCH-000012	^
<input type="checkbox"/>	705-531-203	TRAINING01-ADMIN-000002	

<
>
v

Items: 2

Cancel
Join Studio Session

**NOTE**

- The Document workflow is completely controlled via InEight Document. There is no option to manage the reviewers or documents from Bluebeam during the review process.
- During the Review, if any change is made to any document in the InEight Document document workflow (for example, adding or removing reviewers), all documents in the same Bluebeam session will receive that change.
- Document sends a notification when a Bluebeam Studio session is approaching 90 days of inactivity. The notification gives you time to take action, so the documents are not removed from the session.



## 2.3 REVIEWING DOCUMENTS IN BLUEBEAM

Document reviews in Bluebeam can be launched from Document.


### 2.3 Step by Step 1 — Review documents in Bluebeam

Summary: Review documents in Bluebeam to view and mark up PDFs and other file formats.

Considerations: Ensure the reviewer has access to either Bluebeam Revu or Bluebeam Vu software and a Bluebeam studio account. You can launch up to 300 files in a single Bluebeam session. This limit prevents errors when many documents of varying sizes have been launched into a session.

Quick steps:

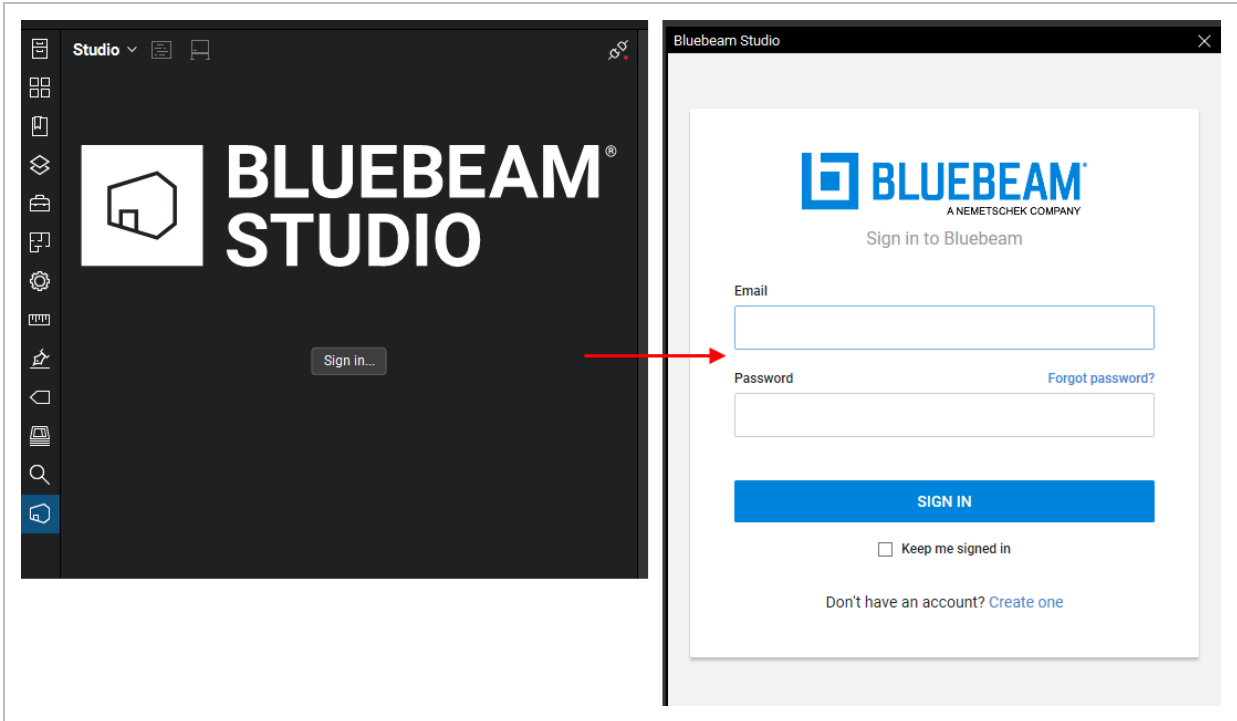
2. Go to the Document Review or Manage Document Workflow screen.
3. Click the Studio Session ID link for each document to directly launch the Bluebeam session.

<input type="checkbox"/>	External review		Document No. ↑
	<input type="text"/>		<input type="text"/>
<input type="checkbox"/>	<a href="#">157-032-800</a>		<a href="#">000-TE-0002.A.IFI</a>
<input type="checkbox"/>	<a href="#">157-032-801</a>		<a href="#">000AUTOMB</a>

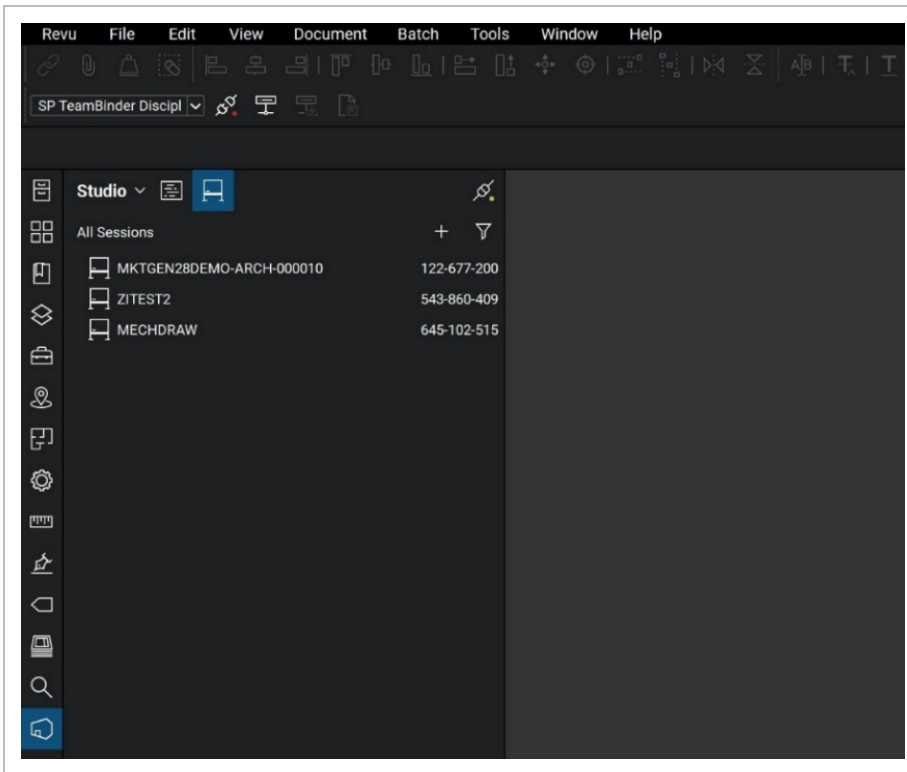
What's next: Review and markup the document with Bluebeam.

## 2.4 REVIEWING DOCUMENTS IN BLUEBEAM STUDIO

1. To connect to the project and documents that need to be reviewed, select the disconnected power plug icon then choose **Work Online** and enter login details.

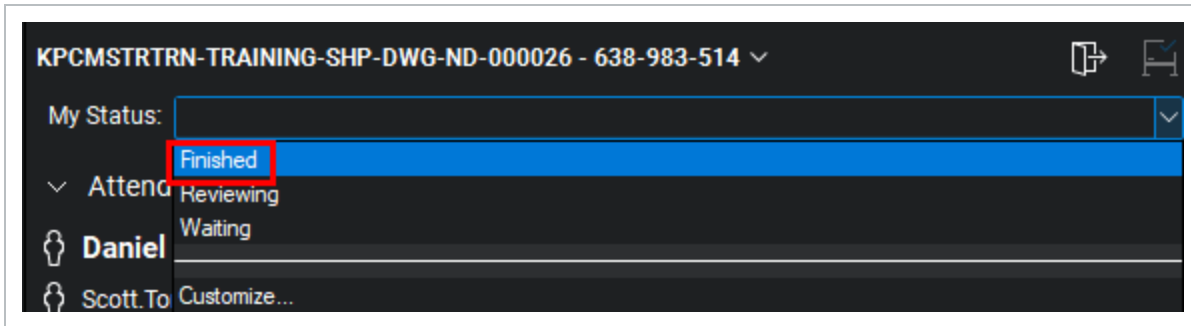


2. Once logged in, the user will see a list of sessions requiring review.



3. Once downloaded, the user can select the required PDF and begin reviewing the document.

- Users finish their reviews via Bluebeam Revu/Vu and set the status in Bluebeam as “Finished” once completed.

**NOTE**

- InEight Document creates a session history document attaching the Bluebeam session history.
- 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 via the Manage Document workflow screen. All the attached supported Mails/Documents/Forms (and any PDF attachments that they have) will be immediately visible in the Bluebeam session.

## 2.5 CANCELLING A REVIEW

- From the Manage Document Workflow screen, click **More**.
- Select **Cancel Bluebeam Review Session** from the menu dropdown.
- The system will give a prompt and remove the selected documents from the Bluebeam session accordingly.
- Once the Bluebeam session is cancelled the review can be completed in InEight Document with the Review Coordinator.

## 2.6 RELEASING A DOCUMENT

- Once all the reviewers have completed their reviews, the Review Coordinator will be notified as usual and can complete the release in InEight Document.
- 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.

3. The Review Coordinator will finish his/her review in Bluebeam and return to InEight Document to update the release status and release the document.
4. The system will check out the document with a comment “Document checked out pending for Bluebeam review document” (with admin account).
5. 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 consolidated file when the finalised document and history documents are available. The history document will also be created.

**NOTE**

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

## 2.7 AUTO COMPLETION OF REVIEW/RELEASE

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.

## 2.8 STATUS INDICATOR & LOCK FOR BLUEBEAM REVIEWS

1. From the ‘Release’ window, select **Open** in the Bluebeam column.

Review status	Download	Redlines	Scheduled Completion	Reviewer Review Status	Studio session name	Bluebeam
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Select one			16-12-20	Awaiting Review/Release		<a href="#">Open</a>

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.

# CHAPTER 3 – BLUEBEAM SPECIFIC PROJECT SETTINGS

The following configurations are available in Project Settings:

1. Enable Bluebeam review in the project (disabled by default).
2. Turn off Document Review/Release notifications when Bluebeam review is enabled.
3. Default Bluebeam session name format

*This page intentionally left blank.*

## CHAPTER 4 – 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.