DOCUMENT MANAGEMENT

INEIGHT

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CHAPTER 1 – INTRODUCTION TO BLUE BEAM 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.

Bluebeam	Bluebeam software installed on required PC.
Versioning	A customisation enabling multiple 'versions' per document revision.
Single Sign On (Optional)	To facilitate document authentication between InEight Document and Bluebeam.

1.3 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. Within Bluebeam click on the settings button in the top right hand corner and then select **Preferences**.

2. Click **File Access**, choose the InEight Document project(s) you wish to link with Bluebeam, then click **Add**.
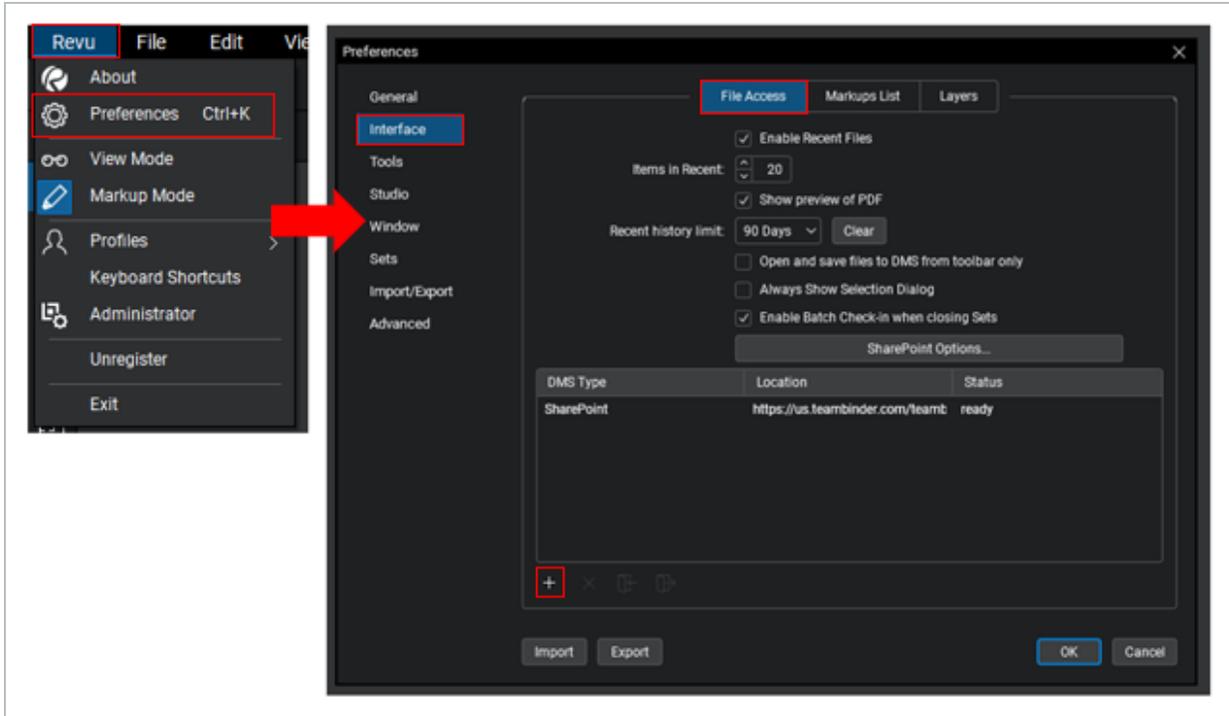
3. Enter the InEight Document Project address into the **Site** field. The address format will be
    https://**www.teambinder.com/TeamBinderADFS/PROJNOVPDEMO/ where the text marked
    in Bold Italic will be the variables from project to project and;**

4. 'www.teambinder.com' identifies the server that the project is located on,

5. 'VPDEMO' identifies the project number on the server.
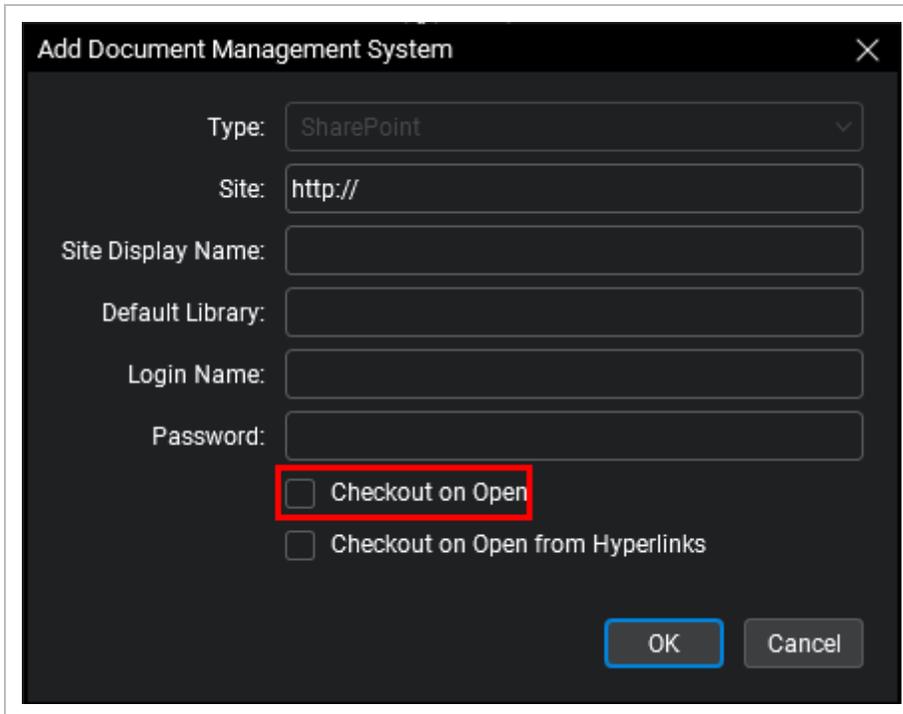
6. This provides users with a list of all PDF file formats against each document to select from.

7. 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.

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/PROJNOVPDEMODiscipline/Type

1.3.1 Connecting to an InEight Document Project

1. Click the drop down option from the top left toolbar in Bluebeam and select a project.
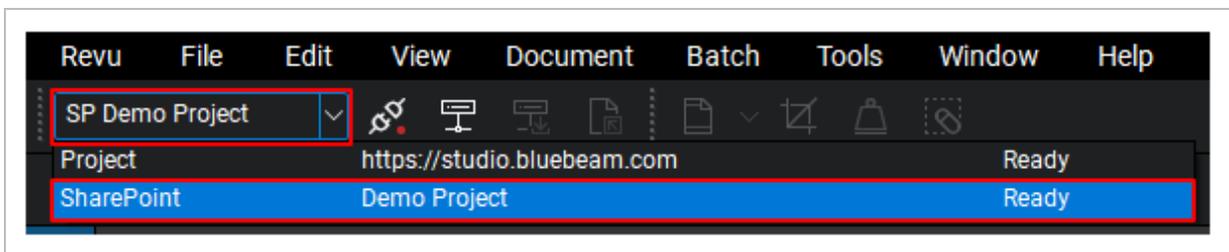
2. If this dropdown is not available, right click on the toolbar and select Document Management.
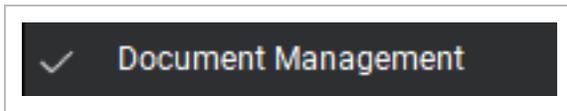
3. Click the power plug icon next the dropdown to connect. Using single sign on (if enabled) will connect the user and provide them with an alternate icon (both plugs joined together and a green circle) which indicates the user is connected to the project.
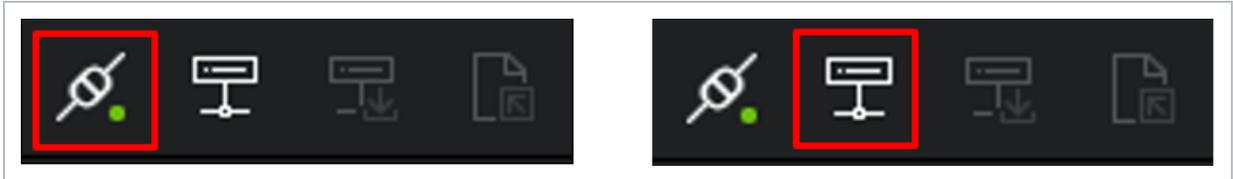
1.4 OPENING INEIGHT DOCUMENT DOCUMENTS IN BLUEBEAM

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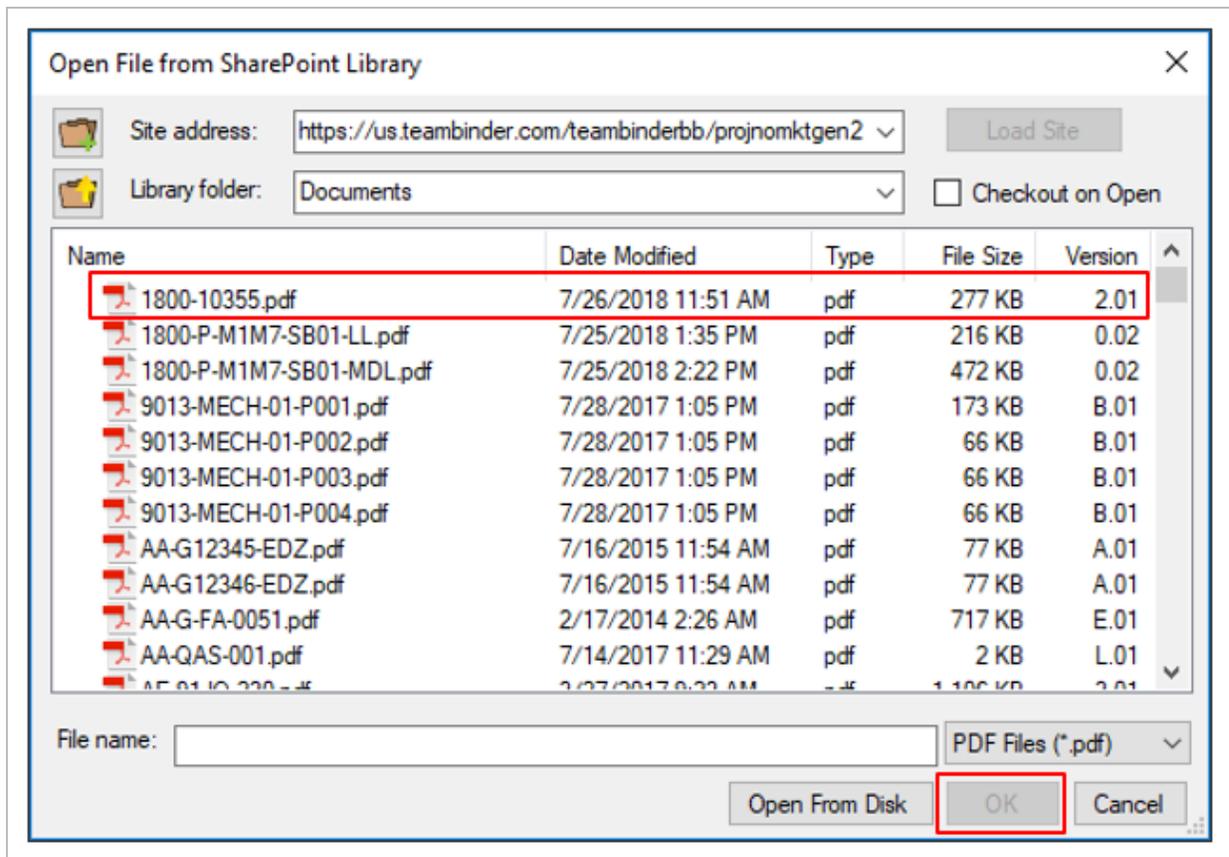
4. To open the required PDF file, select the document then click **OK**.

1.5 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.
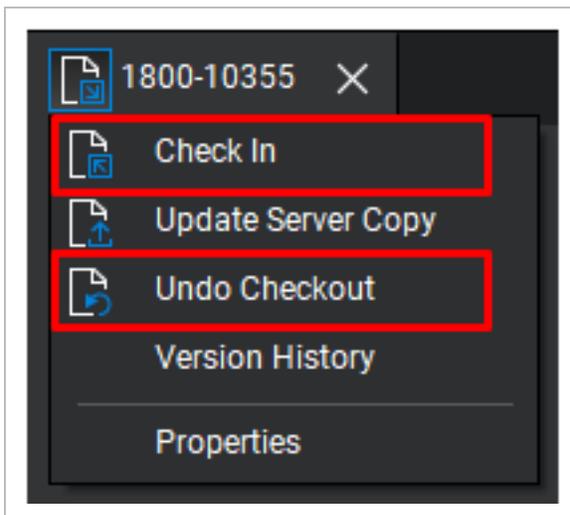
NOTE   Documents can be unlocked automatically when added to Bluebeam by enabling the 'Checkout on Open' function when adding an InEight Document project to Bluebeam.

1.6 OPENING BLUEBEAM DIRECTLY FROM INEIGHT DOCUMENT

1. Access InEight Document using Internet Explorer.

2. Go to the Document Register and locate the document you wish to open with Bluebeam.

3. Right click on document and select **Open Latest Version with Bluebeam**.

Generate Document Hyperlink

View User Access

View Current Review Status

View Transmittal History

Open Latest Version with BlueBeam
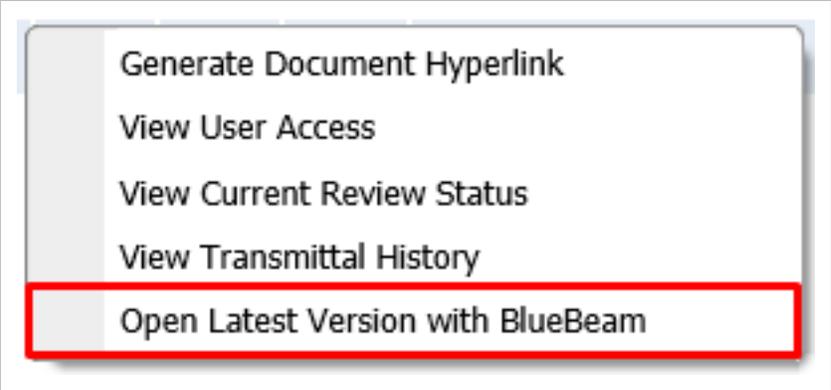
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CHAPTER 2 – INTRODUCTION TO BLUEBEAM DOCUMENT REVIEW

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

2.1 REVIEWING DOCUMENTS IN BLUEBEAM

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.

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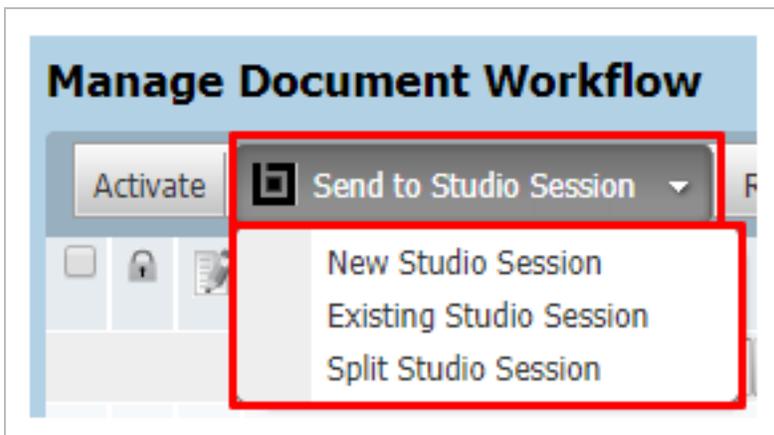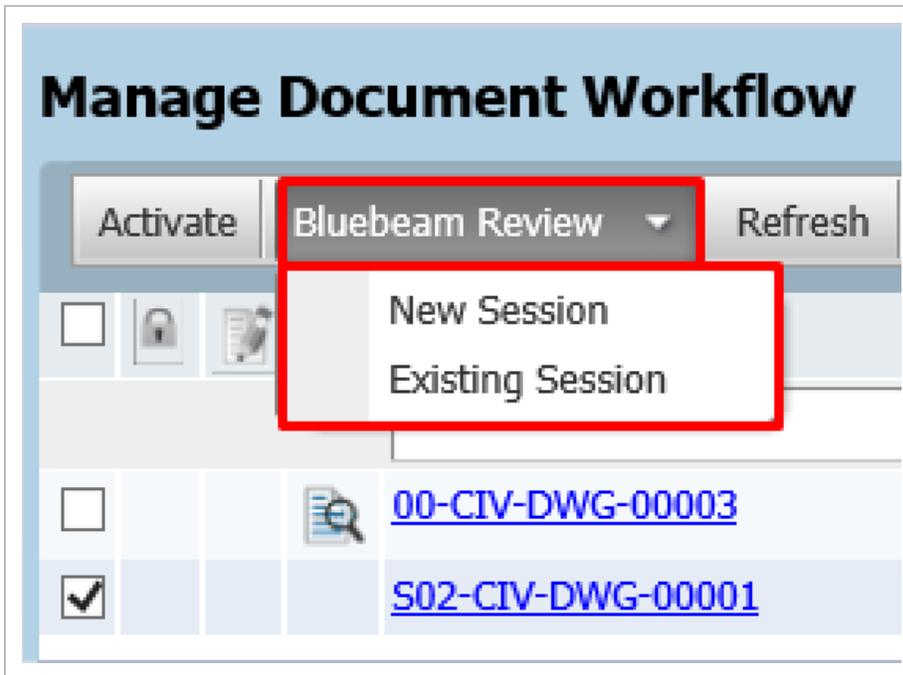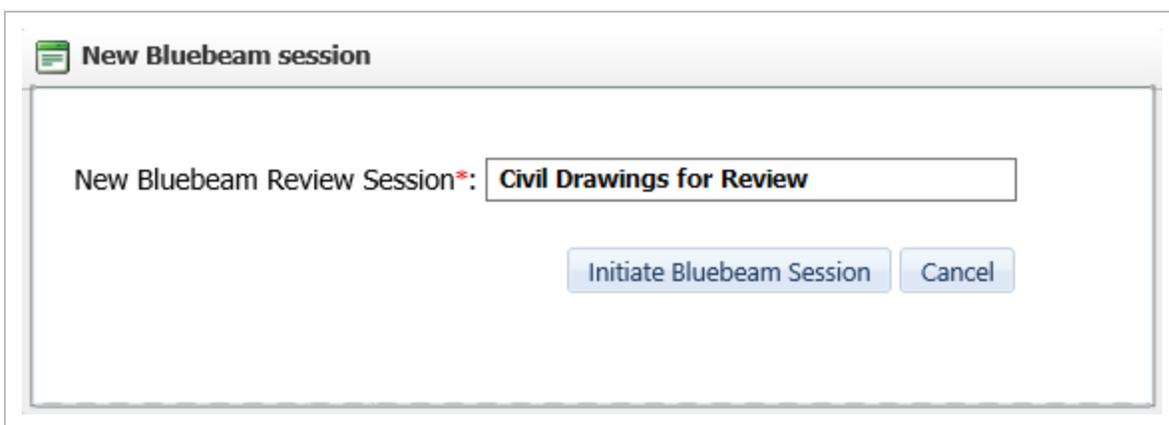
2. Existing Session — displays a list of all current active Bluebeam sessions that are still on the first level review with a link to join the session. Clicking this link will add the previously selected

documents to the session.
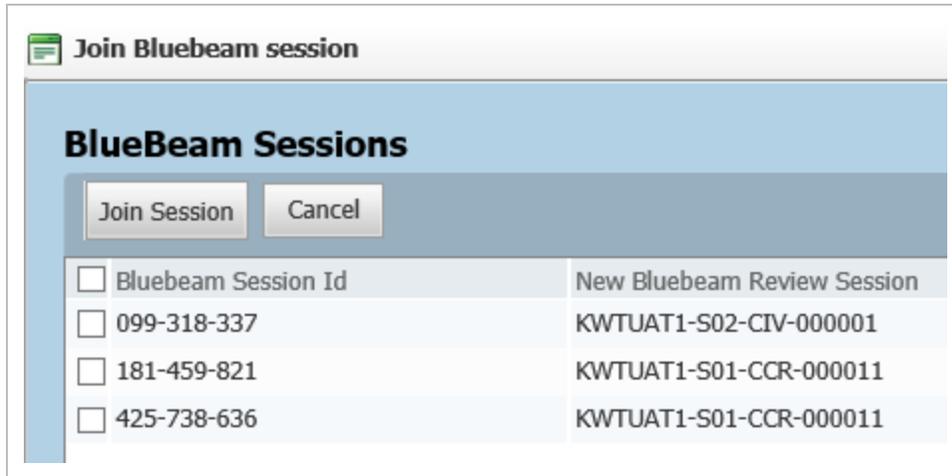

NOTE	• The Document workflow is completely controlled via InEight Document. There is no option to manage the reviewers or documents from Bluebeam during the review process.
	• During the Review, if any change is made to any document in the InEight Document document workflow (e.g. adding or removing reviewers), all documents in the same Bluebeam session will receive that change.

2.3 REVIEWING DOCUMENTS IN BLUEBEAM

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 Document Workflow screen.

3. Click the Bluebeam Session ID link against each document to directly launch the Bluebeam session.

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.
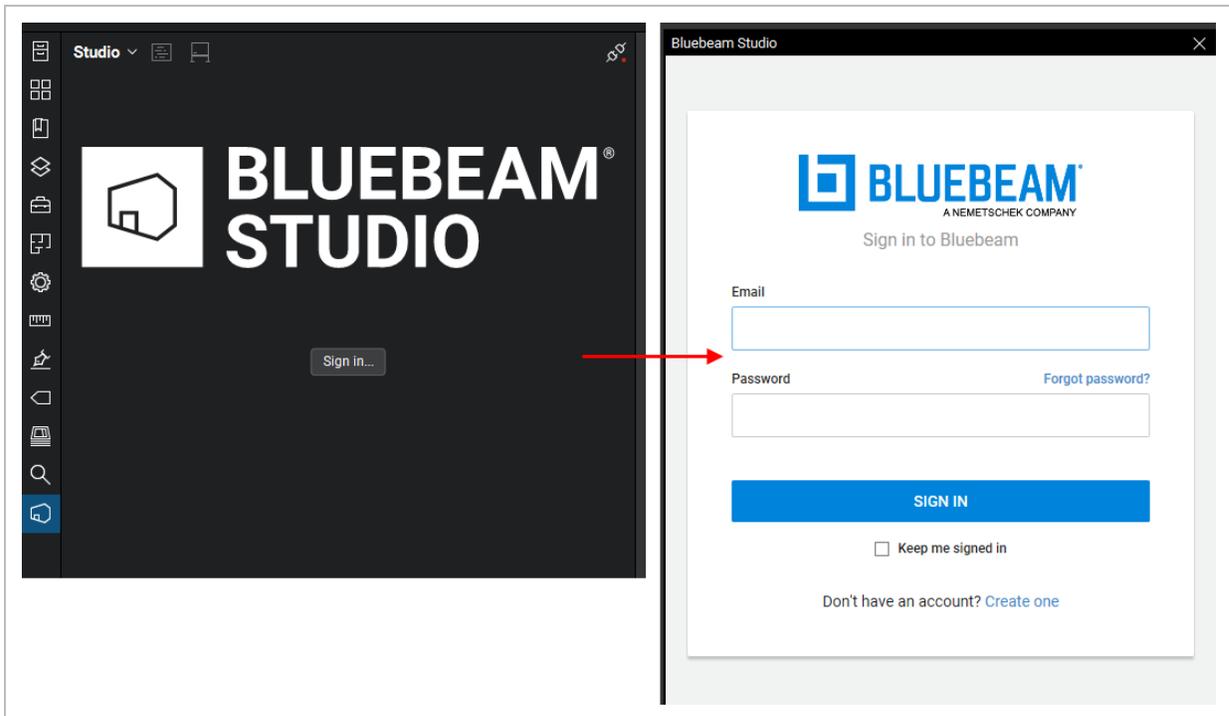
2. Once logged in, the user will see a list of sessions requiring review.
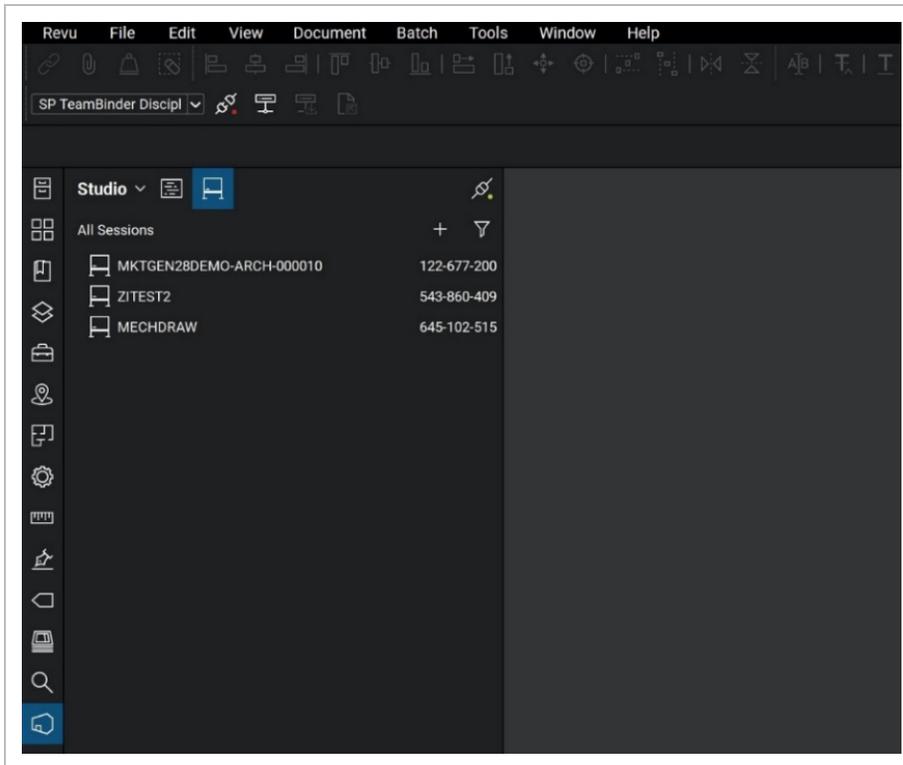
3. Once downloaded, the user can select the required PDF and begin reviewing the document.

4. Users finish their reviews via Bluebeam Revu/Vu and set the status in Bluebeam as "Finished" once completed.
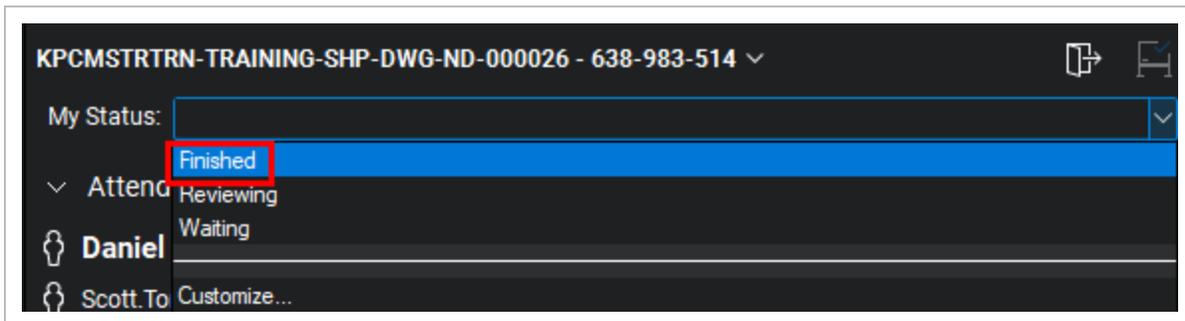
| NOTE	• InEight Document creates a session history document attaching the Bluebeam session history.
	• The Review Initiator or Project Administrator can add additional supporting InEight Document Mails/Documents/Forms/external PDFs (as PDF files) to any active Bluebeam session via the Manage Document 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

1. From the Manage Document Workflow screen, click **More**.

2. Select **Cancel Bluebeam Review Session** from the menu dropdown.

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.

2.6 RELEASING A DOCUMENT

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

2. 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 INTEGRATION WITH PACKAGES

Similar to the above, on a project where Bluebeam studio integration is enabled for document review process, users can do Bluebeam review for the documents in Packages from the Package Details screen (before it is Issued/Released). This is available for both Standard and Release package types.

2.9 INITIATING A REVIEW WITHIN A PACKAGE

1. Select the package and click on the Documents tab.

2. Click 'Initiate Bluebeam Review'. The user can select one or more documents with a PDF file format excluding any checked-out documents, and then initiate the review.

3. The following will occur automatically once the Review process is initiated:

   a. The Package recipients will be added as the Bluebeam Reviewers.

   b. The system will 'Check Out' the selected documents while the Bluebeam review is in progress.

   c. Completed reviews in Bluebeam will be processed in the background. (QAMailer will retrieve the consolidated PDF view for each of the documents from Bluebeam, check-in the document and replace the existing PDF file with the consolidated file after backing up the original attachment).

   d. The system will create a session history document attaching the Bluebeam session history to the document.

NOTE	• Multiple studio sessions can be initiated by different users to the same document at the same time. However, if the active user or their company already have a session initiated by them, when creating a new session, they will be prompted to confirm whether they want to start another session and given the option to edit/update/join the current session that is in progress.
	• The new Bluebeam Session Report will list all the active sessions created by Package Review.

2.10 STATUS INDICATOR & LOCK FOR BLUEBEAM REVIEWS

1. From the 'Release' window, select **Open** in the Bluebeam column.
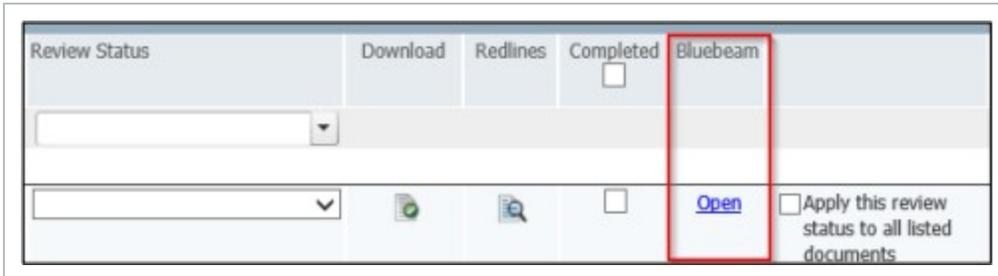
2. If the mark-up consolidation process is not complete and the document has not been returned from the Studio session, the below error message will prevent your team from prematurely consolidating comments, ensuring that comments have been transferred fully between systems first.
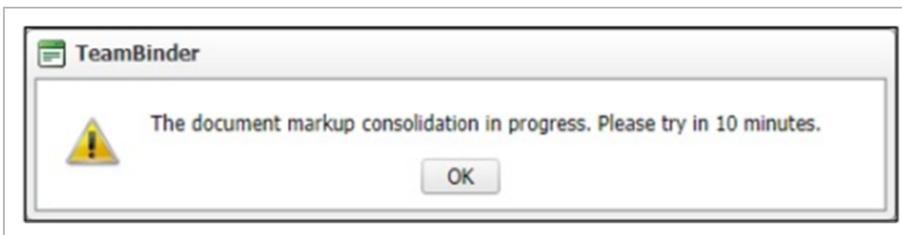
CHAPTER 3 – BLUEBEAM SPECIFIC PROJECT SETTINGS

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

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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.