Bluebeam Revu 2016: Basics Guide

(YOGI v1.0)

Table of Contents

"Required," "Recommended," "As Needed"

Depending on your requirements, you may decide to skim over some of the topics recommended. Before you do that, check out the chart below & compare it with the table of contents. The highlighted modules were covered during the training sessions most of you attended. Together, they will help you know what topics should be considered "required," "recommended" & "optional (As needed."

Required

- Module 1: Welcome & Introduction
- Module 2: Interface, Navigation & Profiles
- Module 3: The Markup Tools
- Module 5: The Tool Chest
- Module 6: The Markups List

Recommended

- Module 8: Document Management & Setup
- Module 9: Introduction to Studio
- Module 10: Studio Sessions
- Module 11: Studio Projects

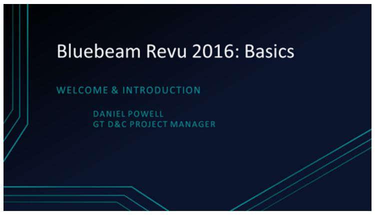
As Needed

- Module 4: Stamps
- Module 7: PDF Creation

1.0 Introductions

1.1 Course Introduction

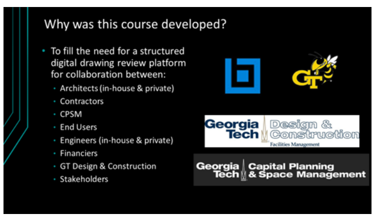
1.1.1 Welcome



Welcome to the **Revu 2016 Basics** course.

In this course you will learn about the **basic**, **core features** of Revu 2016.

1.1.3 Background



This course was created in response to the need for a structured & consistently delivered drawing review program for Georgia Tech projects.

- Revu provides the digital collaborative process for reviewing drawings to help:
  - Condense the drawing review process
  - Alleviate duplicate notes & time consuming data entry

1.2 Introduction to Revu

Lesson objectives

By the end of this lesson, learners will be able to:

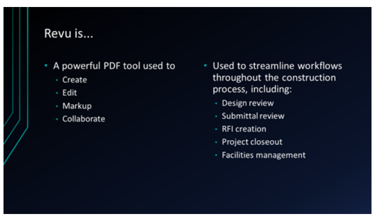
- Use Bluebeam Revu as a powerful PDF creation, editing, markup & collaboration tool.
- Understand Revu is built primarily for technical industries such as Architecture, Engineering, Construction, Oil & Gas.
- Use Revu to streamline workflows throughout the construction process.
- Understand how flexible Revu is as an application that can be used by anyone who works with PDFs.
- Open & edit any PDF that meets the ISO standard requirements in Revu.
- Understand that any PDF created with Revu, can be opened & edited in any other PDF software.
- Understand the difference in working with a vector or raster PDF. Vector is preferred.

- Use the PDF printer driver & PDF creation plugins within Revu to create vector PDFs.
- Understand that old PDFs still exist even though they have a blue icon instead of a red one.
- Change the PDF icon color from blue to red in the Bluebeam Administrator.

1.2.1 What is Bluebeam Revu?

Revu is a **powerful PDF creation**, **editing**, **markup** & **collaboration** tool.

1.2.2 Who Uses Bluebeam Revu?



The **AEC industry** specifically, Revu has tools to **streamline workflows** throughout the construction process, from **design review** to **project closeout** & **facilities management**.

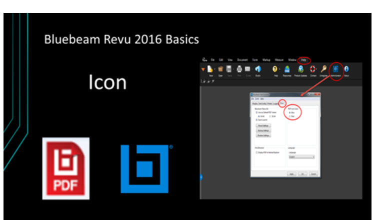
However, Revu is flexible enough for use by anyone who works with PDFs, regardless of industry.

1.2.3 Vector vs. Raster Data & What That Means with Respect to PDF

The content within a PDF is encoded as one of two types of data: **vector** or **raster**.

You can tell if a PDF is made with vector or raster data by zooming in on it.

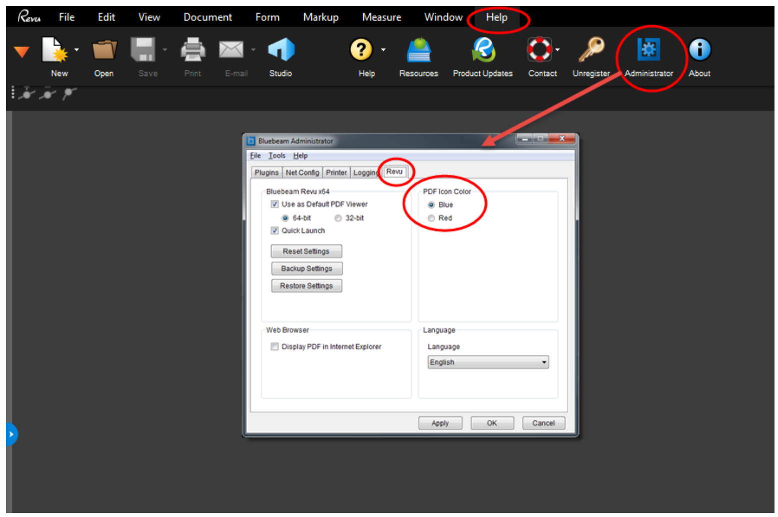
1.2.4 Revu's Impact on Existing PDF Files



Most people recognize PDFs by the **red icon** they're used to seeing on their computer when using other PDF programs.

However, when Revu is set as the default PDF viewer, the PDF icons will appear as **blue** colored icons, similar to those on the left—though the file is still the same.

If you would prefer your icons to show up in red, you can change the color of the icons in the **Bluebeam Administrator**.



2.0 Overview: Interface, Navigation & Profiles

2.1 Module Overview

Lesson objectives

By the end of this lesson, learners will be:

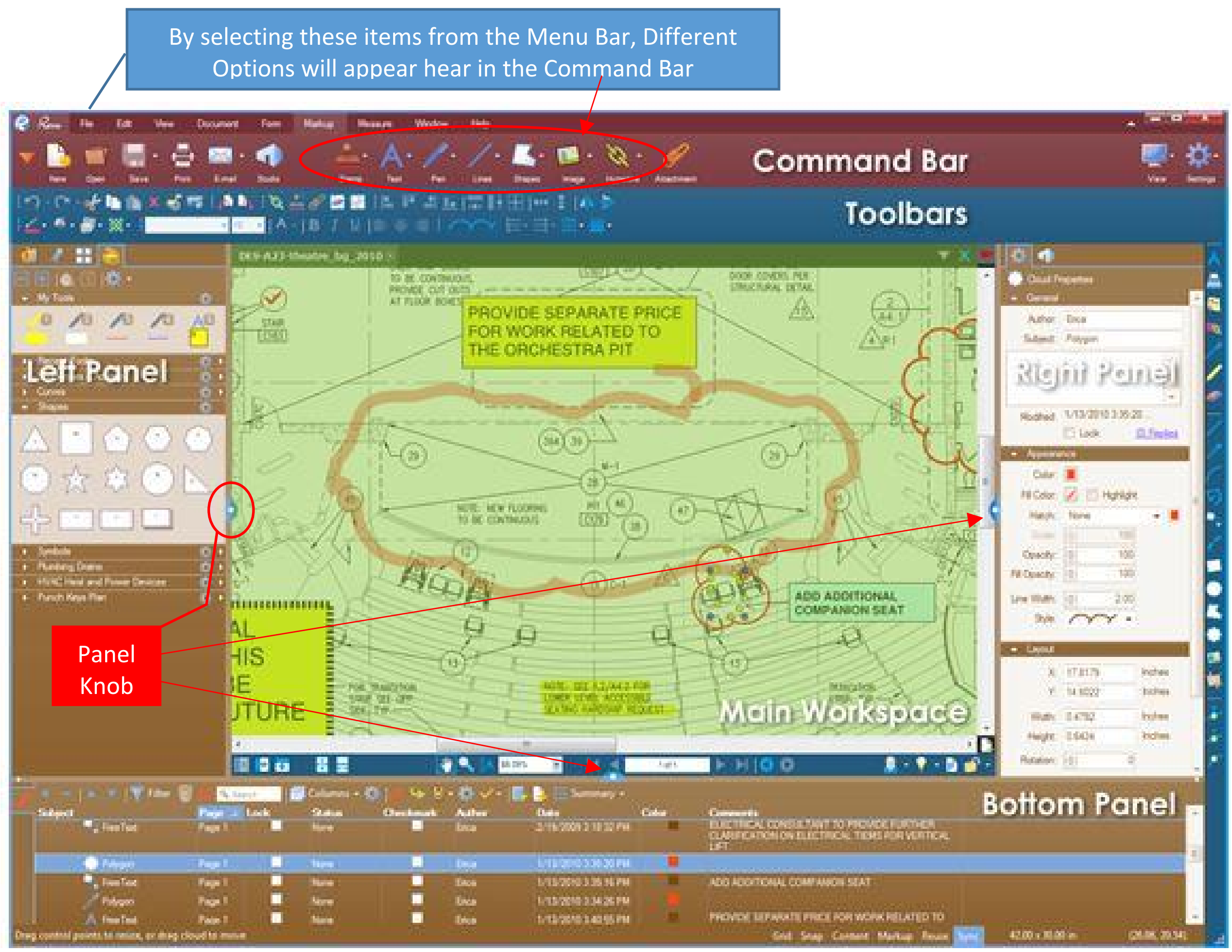
- Familiar with the interface, navigation & profiles

2.2 Command Bar, Toolbars & Menus

Lesson objectives

By the end of this lesson, learners will be able to:

- Describe the function of the menu bar, Command bar & Toolbars.



2.3 Side Panels & Tab Access

Lesson objectives

By the end of this lesson, learners will be able to:

- Hide each of the three panels (left, right & bottom)
- Recognize that Tabs are opened in the panels.
- Use the Tab Access arrow to access tabs.

Activity – Lesson 2.3: Panels & Tab Access Review – Q&A

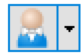
- What's the relationship between a panel & a tab?
  Answer: Panels contain tabs.
- How many panels are there?
  Answer: Three.
- How do you open a panel?
  Answer: Click the blue knob, click & drag the panel edges, Tab Access.

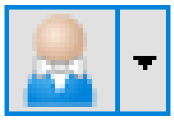
2.4 Profiles & Profile Management

Lesson objectives

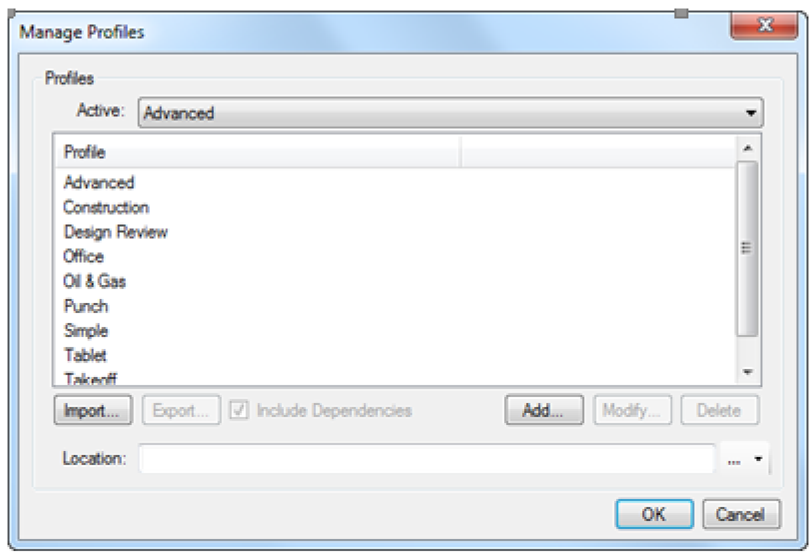
By the end of this lesson, learners will be able to:

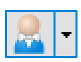
- Recognize why Profiles are helpful
- Turn toolbars on & off.
- Move toolbars to other locations in the interface.
- Turn tabs on & off in the side panels.
- Move tabs to other locations in the interface, including from one panel to another, another location in the same panel (split panel), & as a stand-alone window on another monitor.
- Create a custom Profile.
- Share their custom Profile with others.

- Click the arrow to the right of the  **Profiles** button from either **View** > **Profiles** or from the Navigation bar (use the keyboard shortcut F4 to show it if it's hidden) to prompt a list of available Profiles. The Profile that is currently active will be checked.
- To change Profiles, simply select another one from the menu. Once selected, the Revu interface will update based on the settings defined in the new Profile.



Creating **Custom Profiles**



1. Configure the Revu interface as desired, arranging toolbars, tabs, panels and so on as needed. This configuration will be the custom Profile.
2. Click the  **Profiles** button. The **Manage Profiles** dialog box opens.
3. Click **Add**. The **Add Profile** dialog box opens.
4. Enter the name of the custom Profile in the **Name** field and click **OK**. The **Add Profile** dialog box closes and the new Profile is added to the **Profiles** list and selected as the active Profile.
5. Click **OK** to close the **Manage Profiles** dialog box.

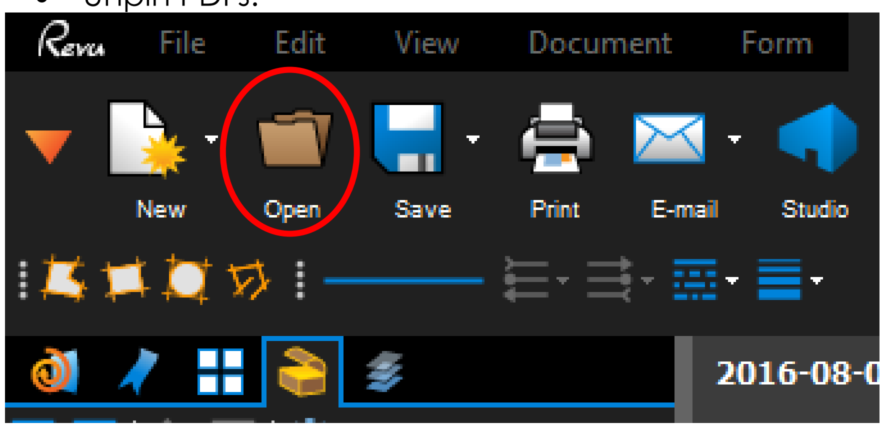
2.5 Opening a PDF

Lesson objectives

By the end of this lesson, learners will be able to:

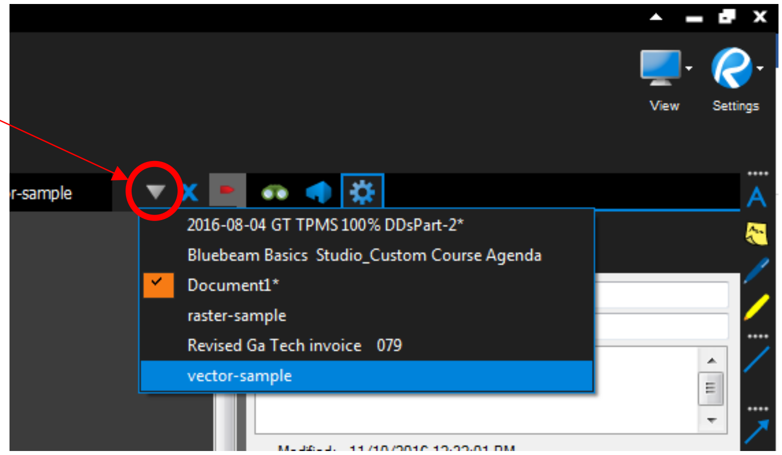
- Open a PDF using the Open icon on the Command bar.
- Recognize that multiple opened files are organized as document tabs in the interface.
- Move document tabs to another location or to a stand-alone window.
- Use the document list arrow to identify the full name of a file when many are open (thus obscuring the name in the tab).
- Open previously viewed PDFs under the Recents section under File Access.
- Pin recent PDFs to the pinned section, an existing category, or a new category in File Access.
- Unpin PDFs.

- Open a PDF using the **Open icon** on the Command bar.
- Or Open a PDF file from File Explorer
- **Right-click** on file & Select to **Open With** Bluebeam

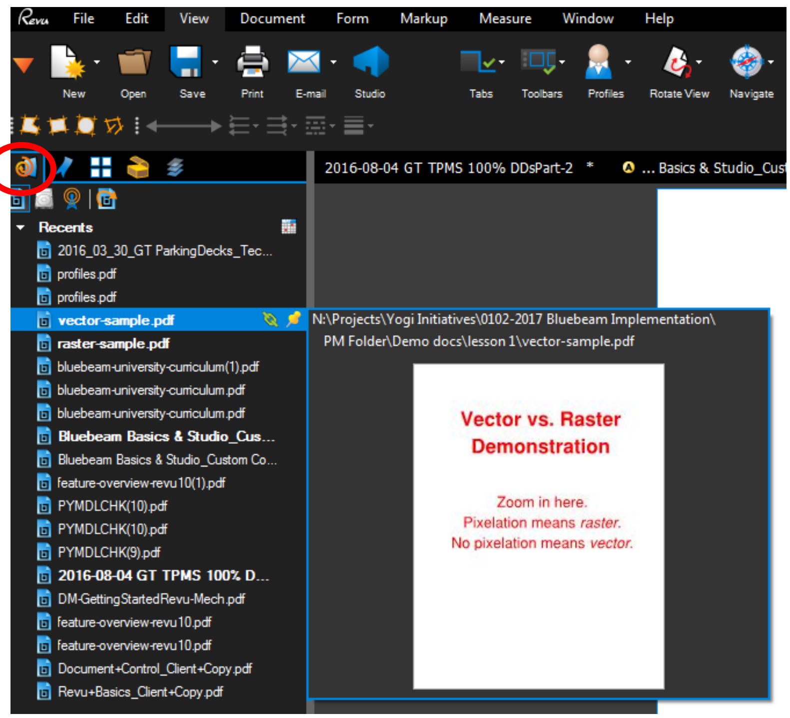


- Multiple opened files are organized as document tabs in the interface.

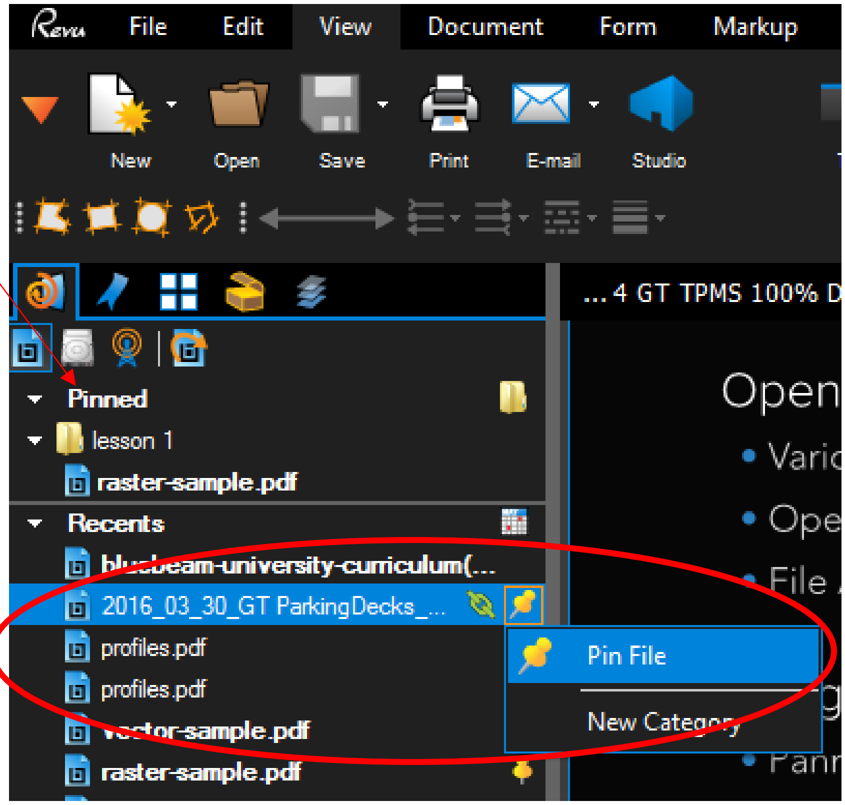
- Use the document list arrow to identify the full name of a file when many are open (thus obscuring the name in the tab).



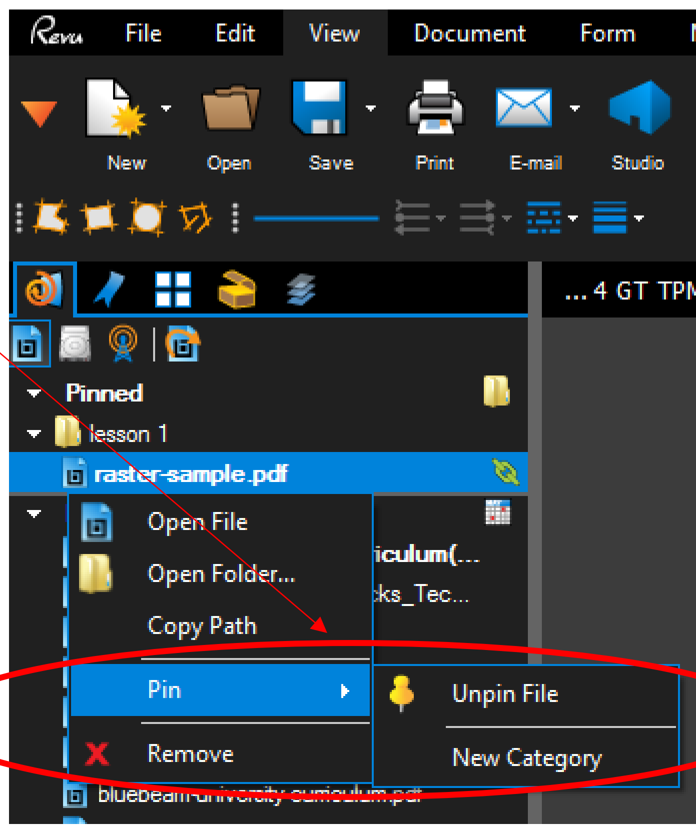
- Open previously viewed PDFs under the **Recents** section under File Access.



- Pin recent PDFs to the **Pinned** section, an existing category, or a new category in File Access.
- Since this follows the path to where the document is saved pinning does not work in Studio unless you are the Host



- Unpin PDFs by right clicking the Pinned doc < Select **Pin** < **Unpin** File



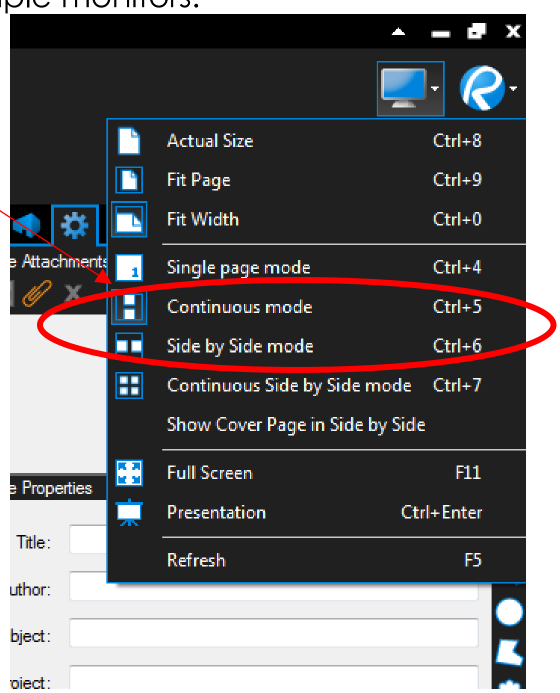
2.6 PDF Navigation

Lesson objectives

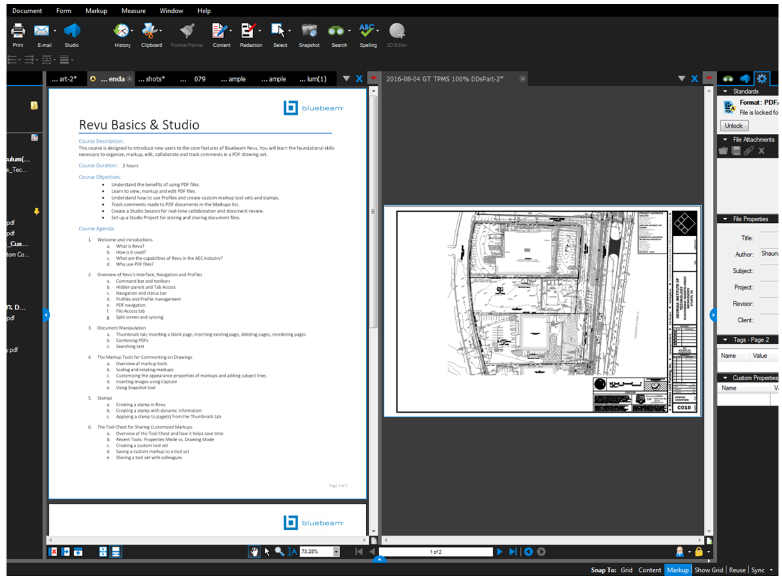
By the end of this lesson, learners will be able to:

- Zoom in & out using the scroll wheel on their mouse.
- Move a document around in the main workspace (panning) with the left mouse button.
- Move a document around in the main workspace (panning) by pressing & holding the center scroll wheel.
- Use Single Page & Continuous modes.
- Use the Ctrl key to modify the navigation default.
- Utilize MultiView to split Revu's workspace up to 16 times.
- Split Revu's workspace & view two different documents side by side.
- Activate the sync function & demonstrate how it enables side-by-side documents to move in tandem.
- Understand that Revu can be used across multiple monitors.

- **Single Page** & **Continuous** modes



- Revu's workspace can be split up to 16 times with **MultiView**. Here is an example of 2 pictured to the right



For more information on **PDF Navigation** click on the hyperlink to the right

[PDF Navigation Training Video]

3.0 The Markup Tools

3.1 Module Overview

Lesson objectives

By the end of this lesson, learners will be able to:

- Understand what markup tools can do
- Give an example of how they can use Revu's markup tools in their everyday workflows.

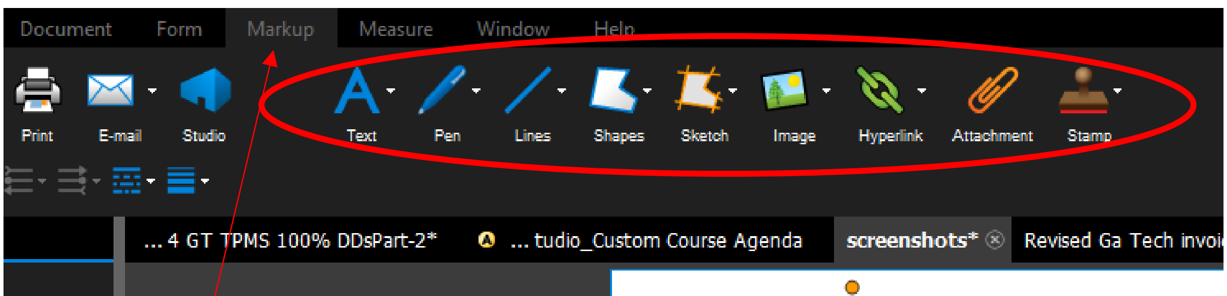
3.2 How to Access Markup Tools

Lesson objectives

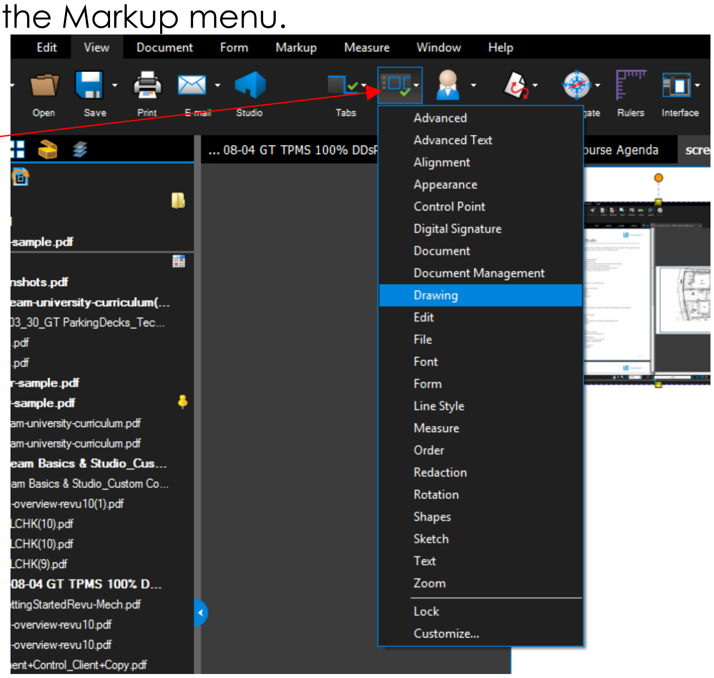
By the end of this lesson, learners will be able to:

- Access markup tools from the Markup menu.
- Access markup tools from the Text & Shapes toolbars.

Access markup tools using keyboard shortcuts.



- Access markup tools from the Markup menu.
- Access markup tools via the View menu from the **Text** & **Shapes** toolbars.



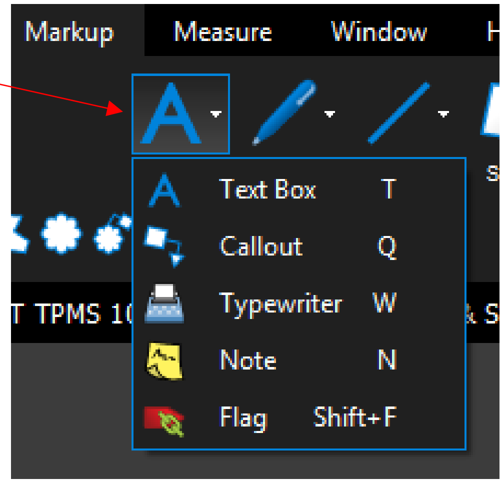
3.3 Types of Markup Tools

Lesson objectives

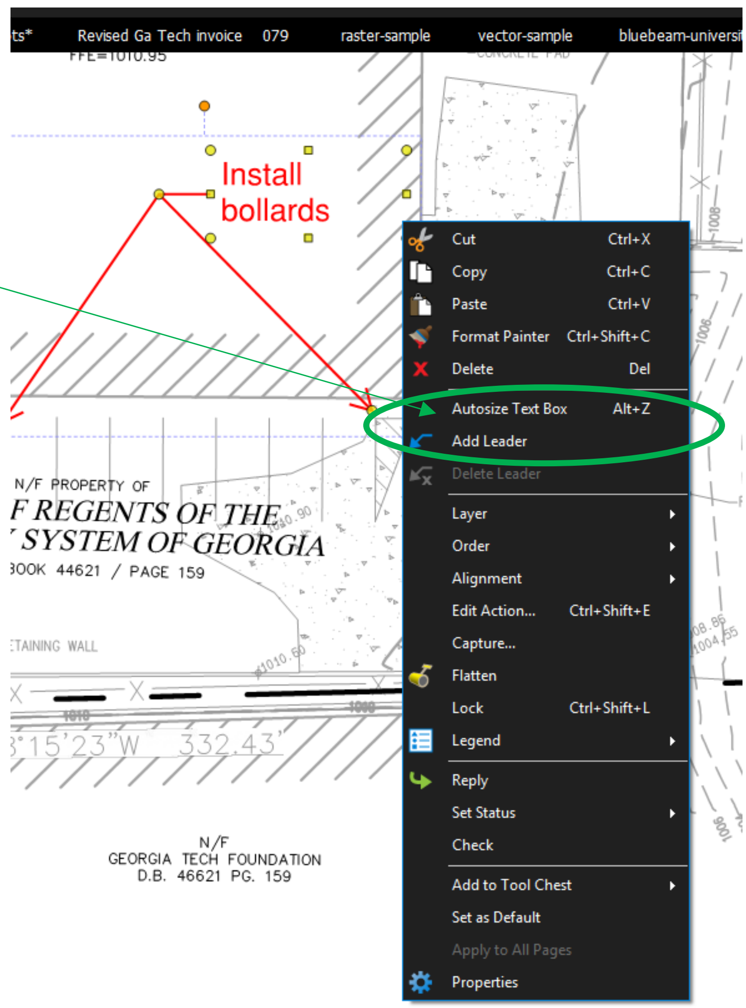
By the end of this lesson, learners will be able to:

- Identify the five (5) types of Text markup tools: Text Box, Callout, Typewriter, Note & Flag.
- Employ right-click to open the context menu for a markup tool.
- Autosize a text box.
- Add a leader line to a callout.
- Identify the three (3) types of Pen markup tools: Pen, Highlight & Eraser.
- Identify the five (5) types of Line markup tools: Line, Arrow, Arc, Polyline & Dimension.
- Identify the five (5) types of Shapes markup tools: Rectangle, Ellipse, Polygon, Cloud, Cloud+.
- Demonstrate the difference between picking points & dragging a rectangle to place a Shapes markup tool.
- Convert any portion of a Polyline, Polygon, or pick-point Cloud markup into an arc.
- Edit the size & shape of Shape markups by moving the blue & yellow control points.
- Add or remove a control point to a shape by right-clicking & selecting "add a control point" or "subtract a control point."
- Place an image on the page using the Image tool.
- Understand that the Crop Image tool works on image markups but not images that are part of the PDF content.
- Place an image on the page using the Camera tool.

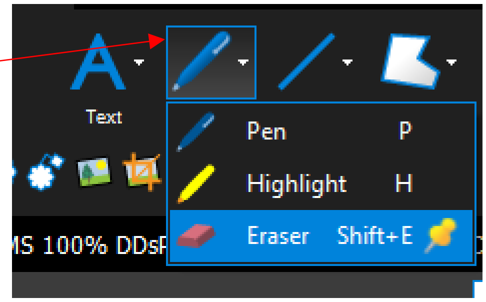
- **Text** markup tools: Text Box, Callout, Typewriter, Note & Flag



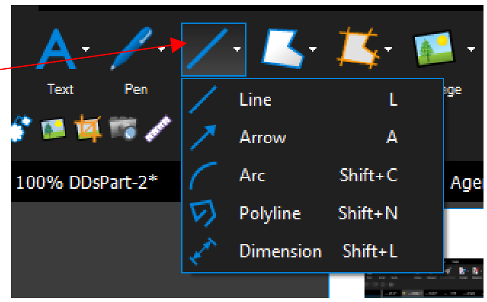
- Employ **right-click** to open the context menu for a markup tool.
- **Autosize** a text box.
- Add a leader line to a callout.



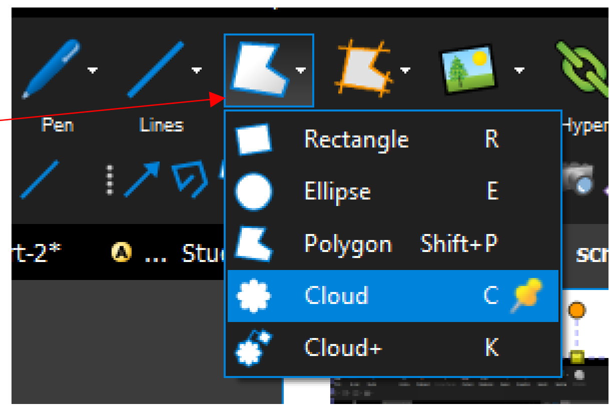
- **Pen** markup tools: Pen, Highlight & Eraser



- **Line** markup tools: Line, Arrow, Arc, Polyline & Dimension



- **Shapes** markup tools: Rectangle, Ellipse, Polygon, Cloud, Cloud+



For more information on **PDF Markups** click on the hyperlink to the right

PDF Markup Training Video

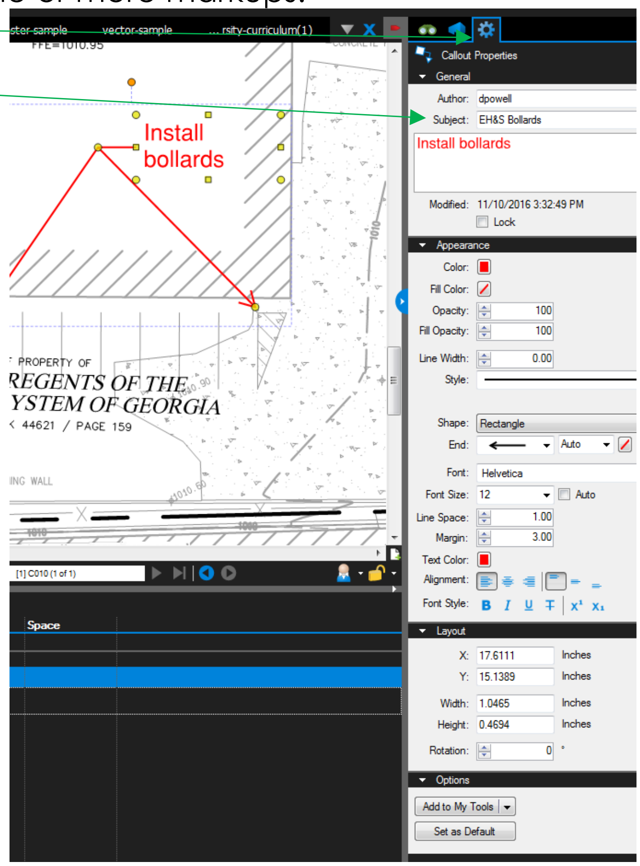
3.4 Customizing the Properties of Markup Tools

Lesson objectives

By the end of this lesson, learners will be able to:

- Customize the visual properties of Text, Pen, Line & Shape markup tools using the Properties tab.
- Change the subject line in the Properties tab for one or more markups.

- Properties tab
- Subject line



For more information on **Customizing PDF Markups** click on the hyperlink to the right

[Customizing Markups Training Video]

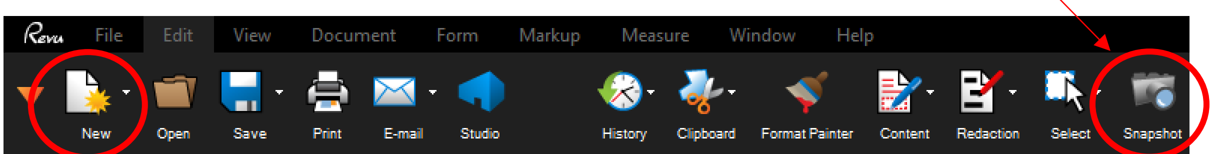
3.5 Using the Snapshot Tool

Lesson objectives

By the end of this lesson, learners will be able to:

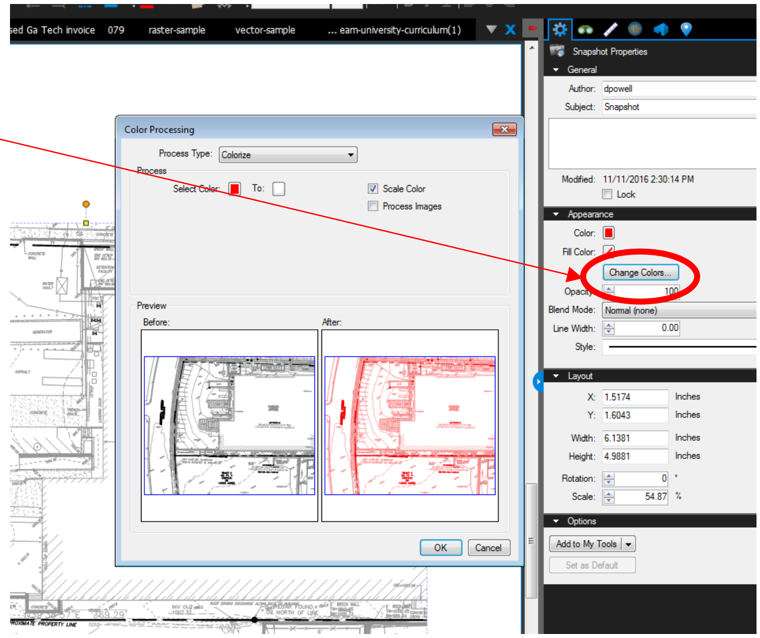
- Copy PDF content using the Snapshot tool & paste it elsewhere on the page or paste it in a new PDF.
- Change the color of copied & pasted PDF content.

- Under the Edit Menu select the **Snapshot** icon.
- With the Snapshot tool, click and drag a rectangle to copy an area of a PDF with your mouse. This content is then automatically saved onto your Windows Clipboard and will maintain the vector data and image quality of the original.
- Releasing the mouse button will take the snapshot. The area that was copied will be highlighted in blue
- To place the snapshot, simply right click on the area where you want to place the image and click **Paste**



- Or Create a new PDF & paste the selected content into the new doc

- Change the color of copied & pasted PDF content.



4.0 Stamps

4.1 Module Overview

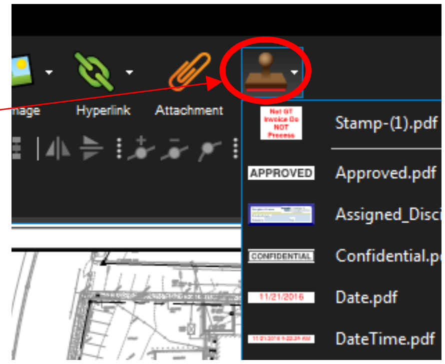
Lesson objectives	By the end of this lesson, learners will be able to: • Describe, in general terms, the critical role that Stamps play in AEC workflows. In the **submittal process**, for example, stamps are used by **architects**, **engineers**, & **consultants** to communicate that a submittal was **examined**, **reviewed**, **rejected**, **approved**, & so on, by various stakeholders. **Revu** improves & simplifies the way professionals determine the documentation or procedural milestones using tools such as **digital** stamps.
For more information on Stamps click on the hyperlink to the right	[Stamps Training Video]

4.2 & 4.3 Applying a Stamp (to a single page or all pages)

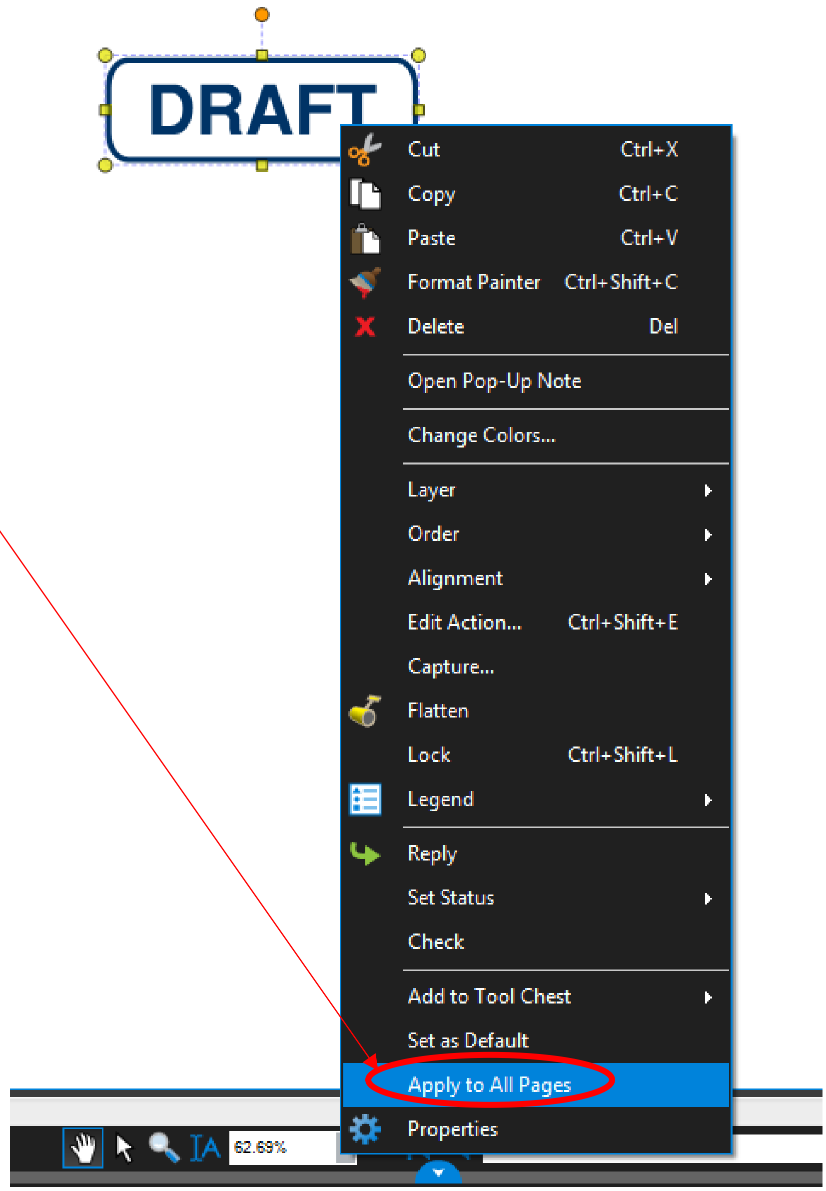
Lesson objectives	By the end of this lesson, learners will be able to: • Select a Stamp from the Command bar's Stamp icon & place it on the page.

- **Right-click** on a Stamp on a PDF & apply it to all pages of the document in the exact same spot.

- Select a **Stamp** from the Command bar's Stamp icon & place it on the page.



- **Right-click** on a Stamp on a PDF & apply it to all pages of the document in the exact same spot.



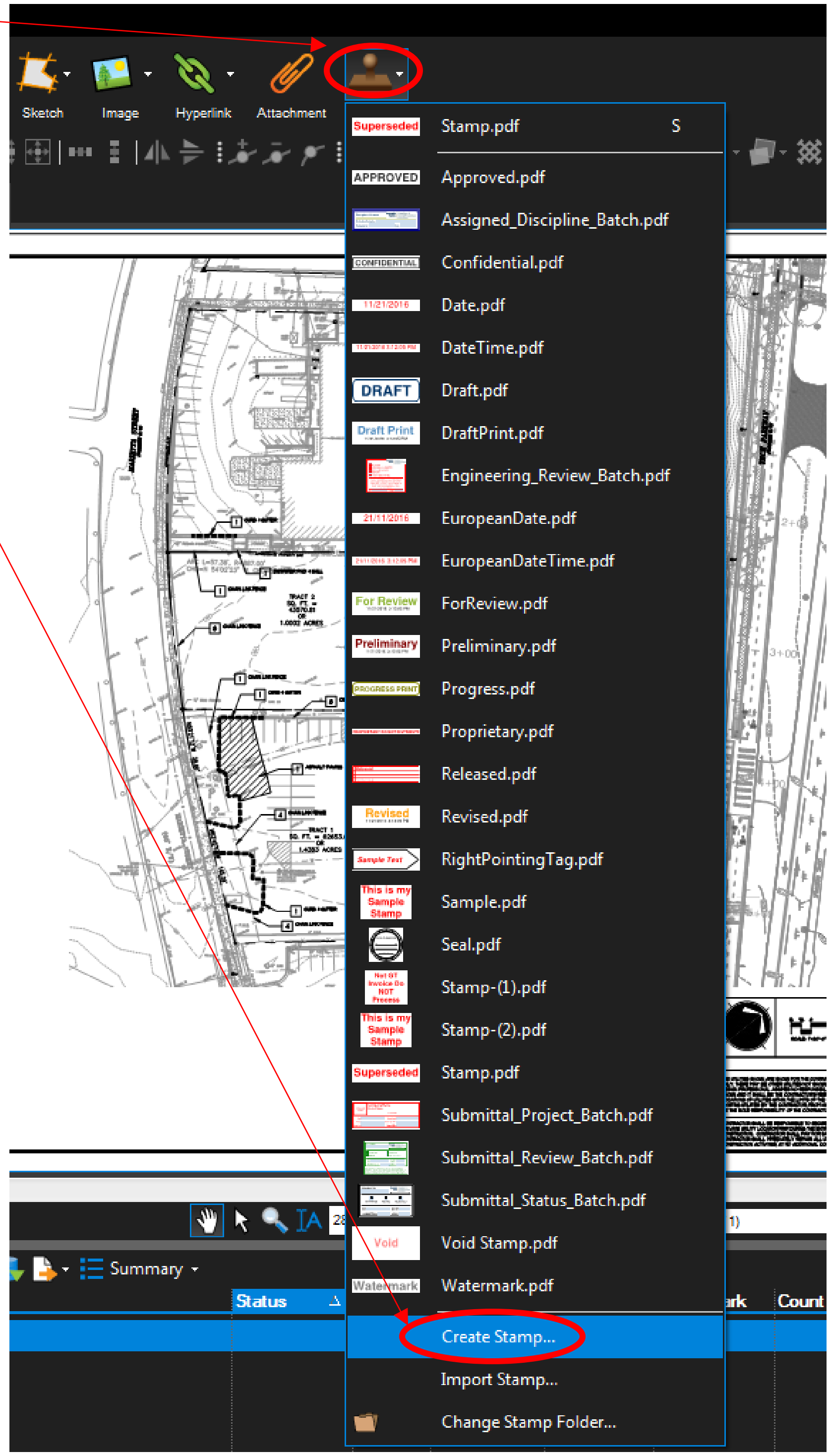
4.4 Creating a Stamp

Lesson objectives

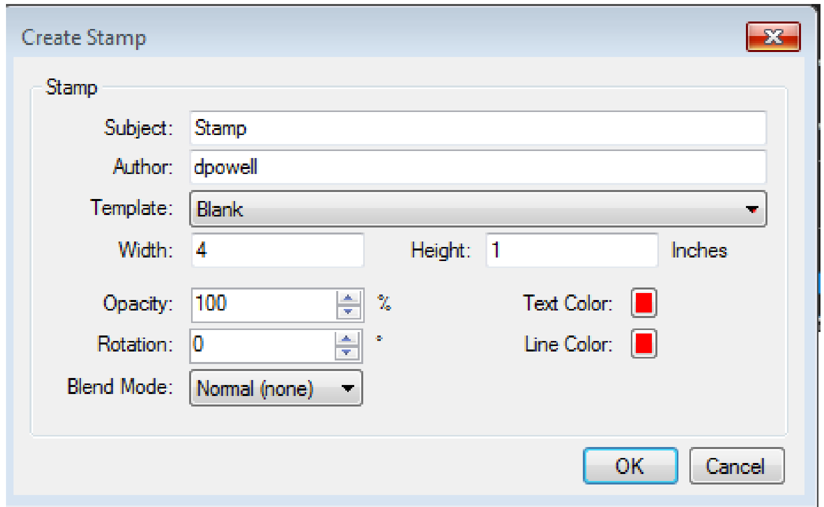
By the end of this lesson, learners will be able to:

- Understand that custom PDF stamps can be created in Revu.

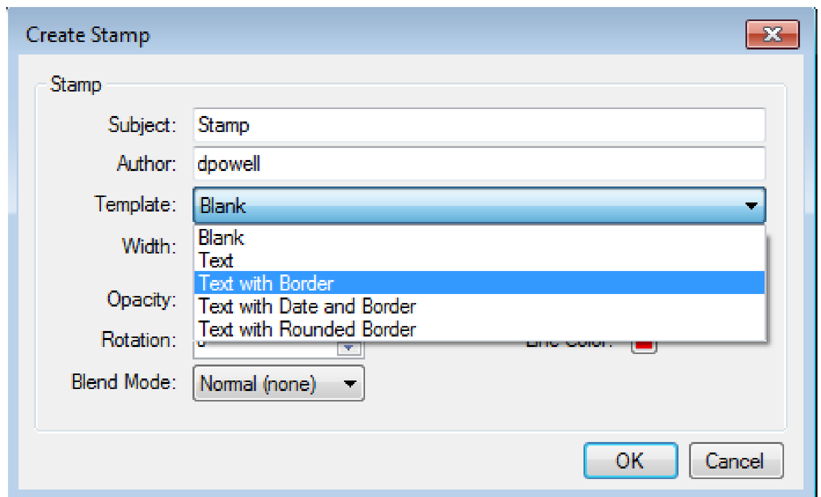
- **Right-click** on the stamp in the Command Bar & then **select** Create Stamp…



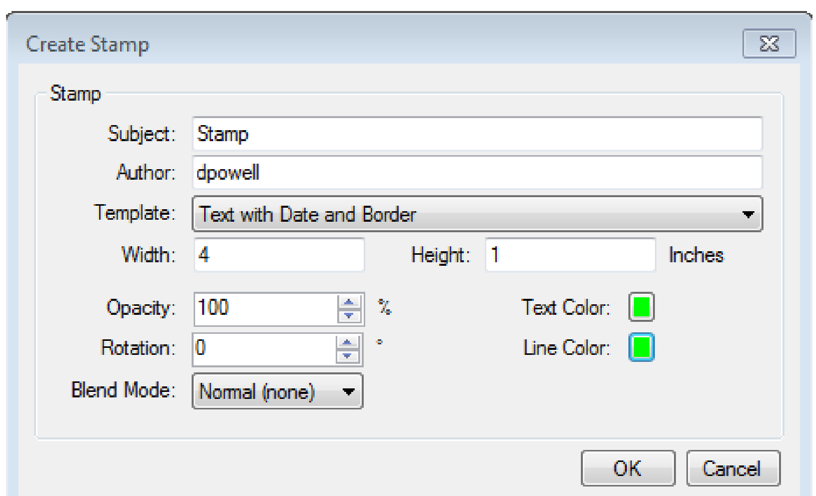
- The **Stamp Properties** dialog box appears



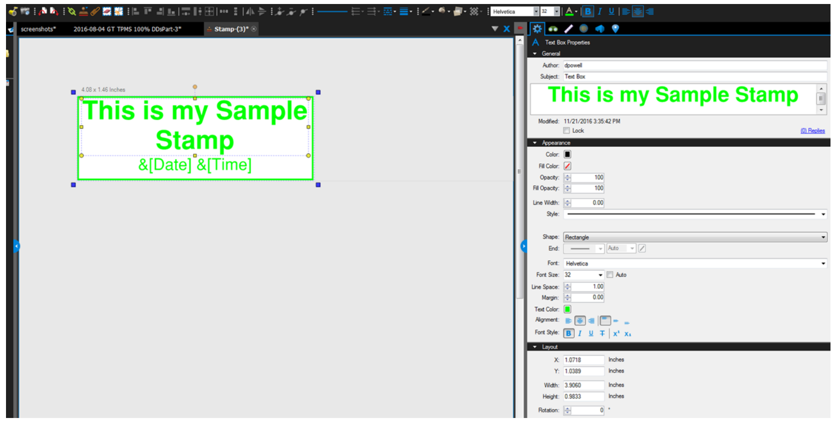
- **Select** the properties you would like to change, including the template & click **OK**



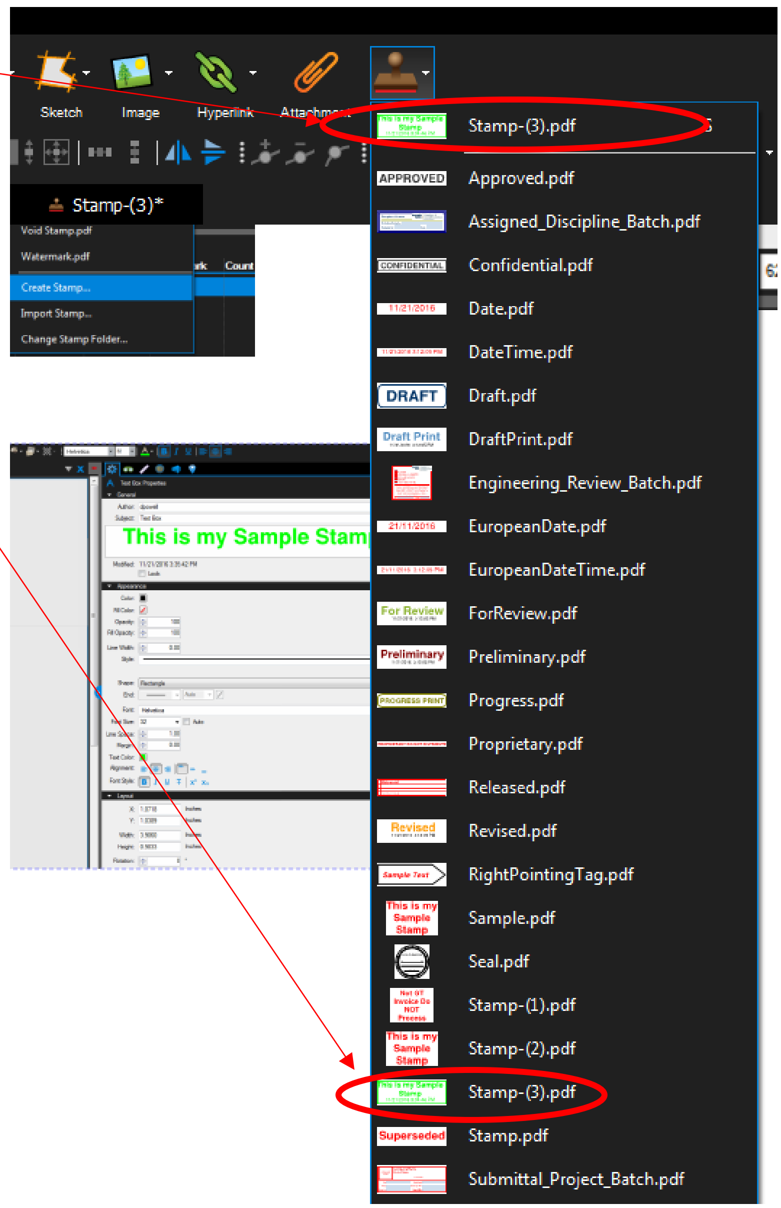
- Once the desired properties are changed click **OK**



- A screen similar to the right will appear & you can fine tune the stamp using the properties in the right panel & save the stamp similar to a document, but the stamp will be saved in the **Stamp** dropdown list



- The stamp is saved here as the last stamp used
- It is saved below for retrieval & later use



5.0 The Tool Chest

5.1 Module Overview

Lesson objectives

By the end of this lesson, learners will be able to:

- Describe, in general terms, the benefit of the Tool Chest in AEC workflows.
- Identify at least one way that the Tool Chest can save time in their work.

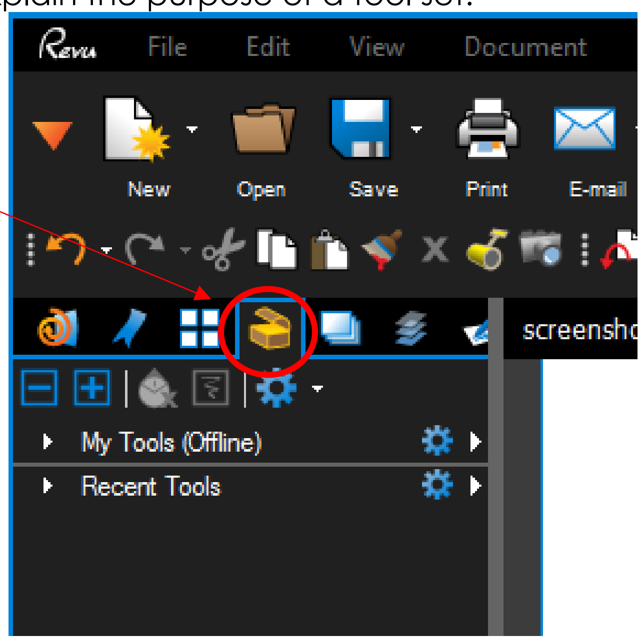
5.2 What Is the Tool Chest & Why does It Save So Much Time?

Lesson objectives

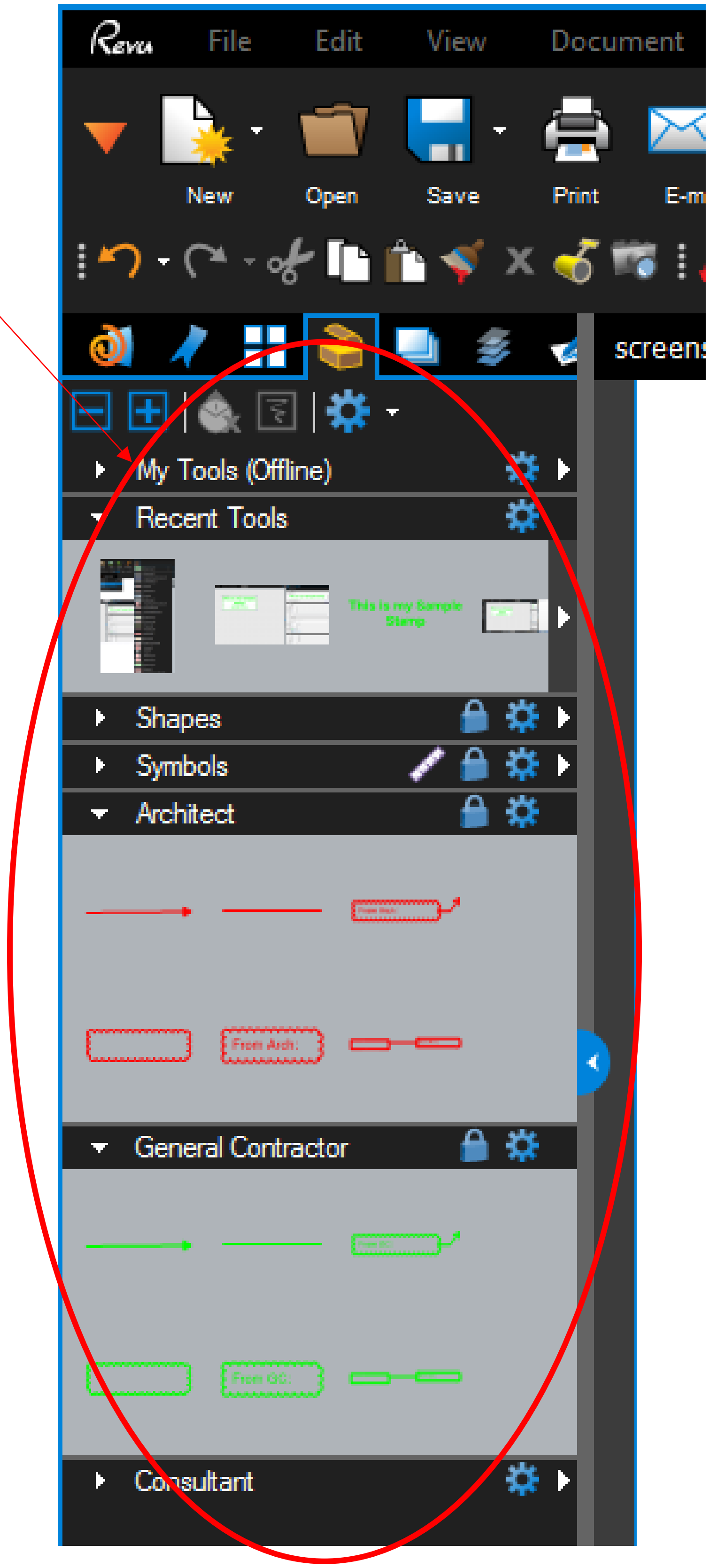
By the end of this lesson, learners will be able to:

- Open the Tool Chest tab.
- Describe the purpose of the Tool Chest.
- Identify at least one way that the Tool Chest can save time in their work.
- Differentiate a tool set from the Tool Chest.
- Explain the purpose of a tool set.

- Open the **Tool Chest** tab



- **Tool sets**


File
Edit
View
Document
New
Open
Save
Print
My Tools (Offline)
Recent Tools
Shapes
Symbols
Architect
General Contractor
Consultant

5.3 Recent Tools

Lesson objectives

By the end of this lesson, learners will be able to understand:

- That Markups become part of the Recent Tools section of the Tool Chest as they are used.
- Items in the Recent Tools section are deleted after every session, so any tools there need to be saved to a tool set for future use.
- That Markups can be moved from one tool set to another.

5.4 Properties Mode vs. Drawing Mode

Lesson objectives

By the end of this lesson, learners will be able to:

- There is a difference between the Properties & Drawing modes within the Tool Chest.
- **Properties mode** adds a new markup with the same appearance properties of the saved markup. In this mode the Properties (as shown on the Properties tab) are retained but the exact dimensions, text, & so on are not.
- **Drawing mode** adds a new markup that is an exact duplicate of the saved markup, as if you'd copied & pasted the original markup rather than made a new one of a similar type.
- To change the mode of a tool in any of these tool sets, double-click on the tool's icon or select it & click / **Toggle Mode** (which icon is shown depends on which mode is currently active) in the Tool Chest toolbar. All information of the original markup is always retained when switching modes. Only the icon & the way that the markup is added to the file changes when the mode is changed. By default, most tools are saved in Properties Mode, though there are some markups that always remain in Drawing Mode.
  - If a tool has a defined Action, the action will only be added to markups created with it when in Drawing mode.

- The **Recent Tools** tool set can be configured to default to either Properties Mode or Drawing Mode. To set the mode, click the **Properties** gear to the right of **Recent Tools** & either check or uncheck **Properties Mode**, as desired.

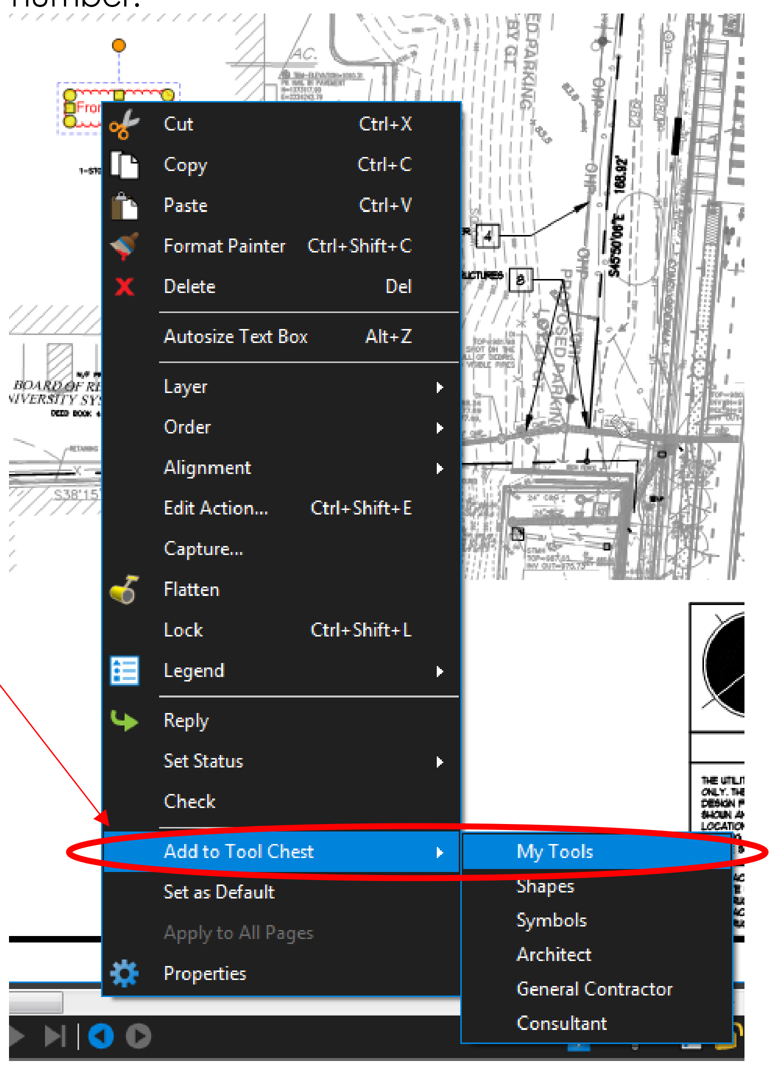
5.5 My Tools

Lesson objectives

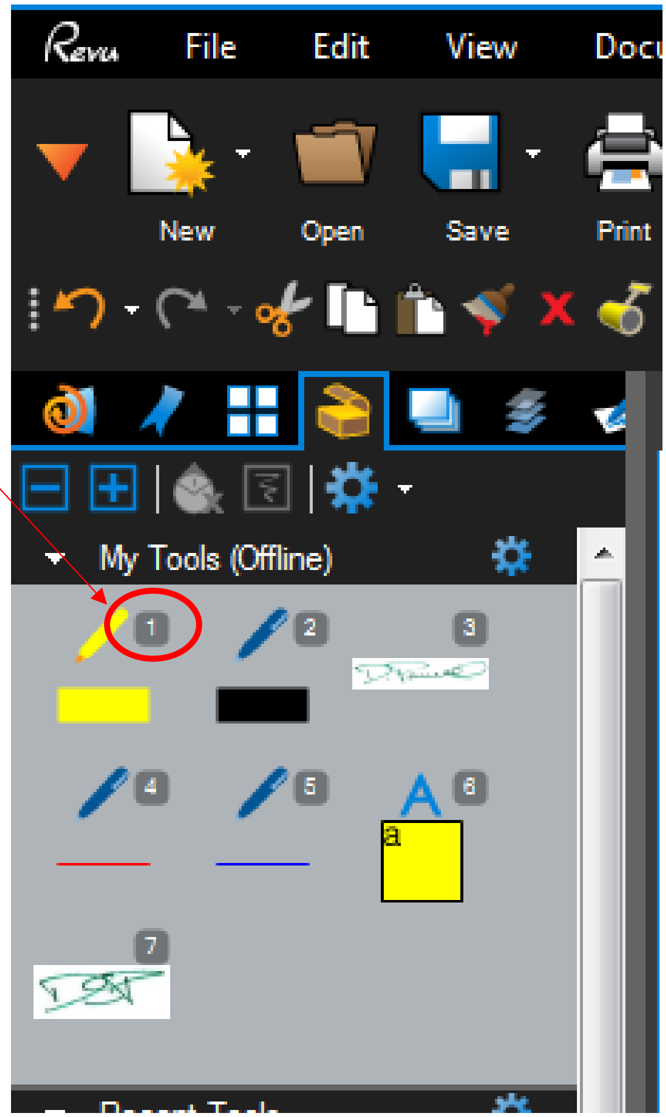
By the end of this lesson, learners will be able to:

- Describe the purpose of the My Tools section of the Tool Chest.
- Save a custom markup to the My Tools section of the Tool Chest.
- Access a tool from My Tools using its shortcut number.

- Save a custom markup to the **My Tools** section of the Tool Chest.
- **Right-Click** the tool **Select** Add to Tool Chest & then **Select** desired tool set where tool should be saved.



- Access a tool from My Tools using its shortcut number.
- While holding the **Left** mouse button press the number associated with the desired tool. Then drag & drop the tool into the document.



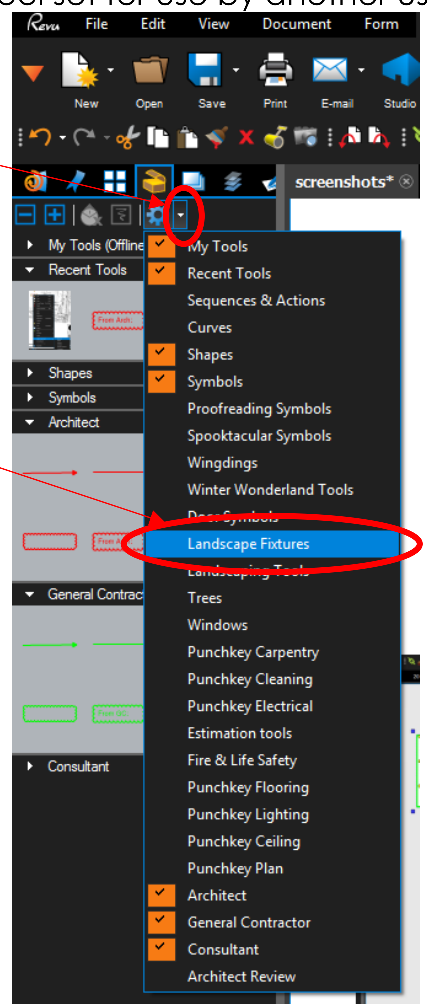
5.6 Tool Sets

Lesson objectives

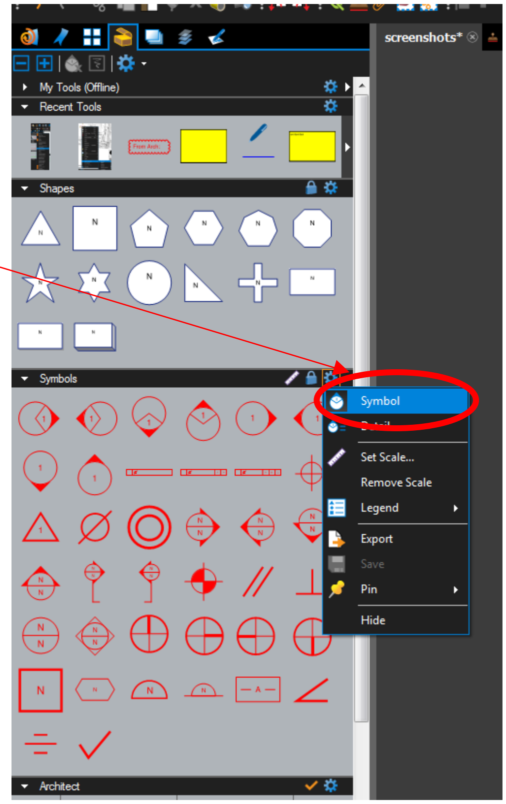
By the end of this lesson, learners will be able to:

- Show/hide the tool sets available in their current Profile using the Manage Tool Sets arrow.
- Switch between Symbol view & Detail view in a tool set & describe the difference between the two.
- Change the order of tools in a tool set.
- Create a custom tool set.
- Direct Revu to save a new custom tool set in all Profiles or just the current Profile.
- Revu is preloaded with trade-specific tool sets.
- Export a tool set for use by another user.

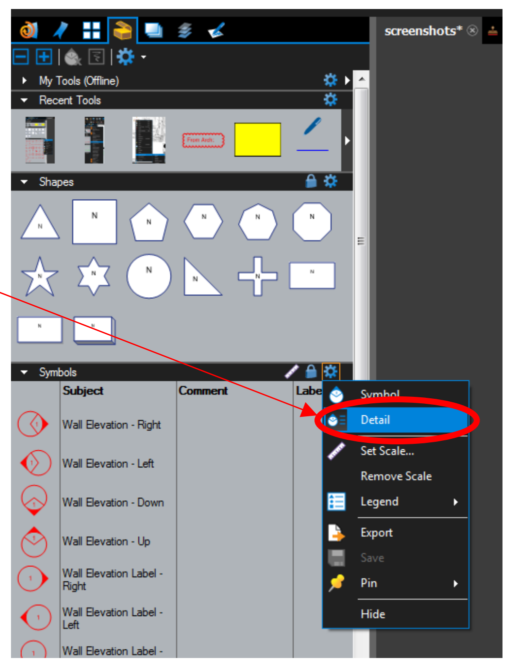
- Show/hide the tool sets available in their current Profile using the Manage Tool Sets **arrow**.
- **Select** the tool sets you wish to display or **deselect** the tool sets you wish to hide.



- Switch between **Symbol view** & Detail view in a tool set



- Switch between Symbol view & **Detail view** in a tool set



For more information on the Tool Chest click the hyperlink to the right

Tool Chest Training Videos

Activity – Module 5 Review

Information

- **What is the Tool Chest? How can it help you save time?**

  Answer: (Generally speaking…) The Tool Chest is a feature in Revu that helps you annotate PDFs faster by letting you store your frequently used custom markups for one-click access.

- What's the difference between the Tool Chest & a tool set?

  Answer: The Tool Chest contains tool sets. Further, tool sets contain frequently used markup tools.

- **What is Recent Tools?**

  Answer: Recent Tools is a special tool set that temporarily stores the most recent markup tool used.

- **What is My Tools?**

  Answer: My Tools is a tool set that's pre-populated with commonly used markup tools so they are always available to you.

- **Explain the difference between Properties Mode & Drawing Mode.**

  Answer: Properties Mode lets you quickly draw new markups that have identical properties—but different shapes & sizes—as the markup tool selected in a tool set. Meanwhile, Drawing Mode allows you to quickly draw markups that have identical properties & identical shape & size as the markup tool selected in a tool set.

- **How would you change a markup from Properties Mode to Drawing Mode?**

  Answer: Double-click the markup tool in the Tool Chest.

6.0 The Markups List

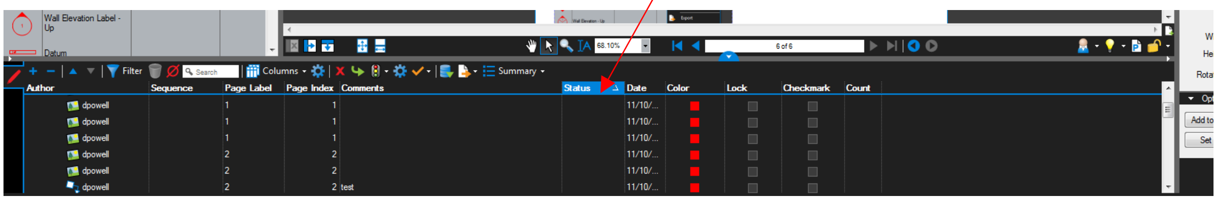
6.1 Module Overview

Lesson objectives

By the end of this lesson, learners will be able to:

- Describe, in general terms, the benefit of the Markups list features.

- Found at the bottom panel of the workspace, by default, the **Markups list** automatically tracks all of the markups placed on a PDF, as well as the information associated with them.



For more information on the **Markups List** click the hyperlink to the right

[Markups List Training Video]

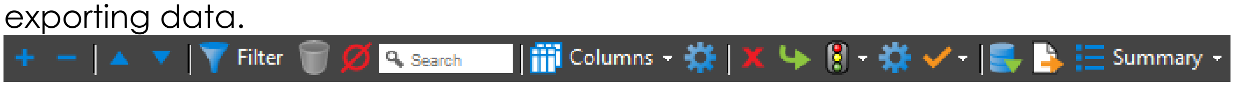
6.2 What Is the Markups List?

Lesson objectives

By the end of this lesson, learners will be able to:

- Open the Markups list tab.
- Explain the purpose of the Markups list.
- Give an example of a workflow in which the Markups list is helpful.
- The Markups list automatically tracks markups placed on a PDF, including author, date, color & comments associated with each markup.

The **Markups list** toolbar contains tools for organizing, processing, importing & exporting data.



+ **Expand All** & − **Collapse All**: Expands or collapses the entire list.

Previous & **Next**: Moves to the previous or next markup in the list.

Filter & **Clear Filters**: Toggles column filters on & off & clears previously applied filters.

Hide Markups: 70Hides all markups in the current PDF file. Markups will not display or print when this mode is enabled. This mode is temporary & will be reset the next time Revu is started.

Search: Filters the Markups list based on the text entered in the field.

Columns: Selects which columns to display in the Markups list.

Manage Columns: Launches the **Manage Columns** dialog box to change the display order & add, remove & create Custom Columns. Columns can also be reordered by dragging & dropping column headers.

Delete: Deletes a selected reply from the Markups list or a selected markup from both the PDF & the list.

Reply: Replies to the selected markup. Replies appear on a new indented row below the markup in question.

Status: Sets the status of the markups. The default statuses are **Accepted**, **Rejected**, **Completed**, **Cancelled** & **None**, but custom statuses can also be created.

Manage Status: Creates & manages custom statuses.

Checkmark: Checks or unchecks the checkbox associated with the selected markup. Also provides a command to clear all checkboxes.

Import: Takes the markups from a PDF or an XML file & includes them in the active PDF (this is useful for incorporating & reviewing markups or feedback from multiple sources). FDF files containing annotations generated from other PDF applications may also be imported.

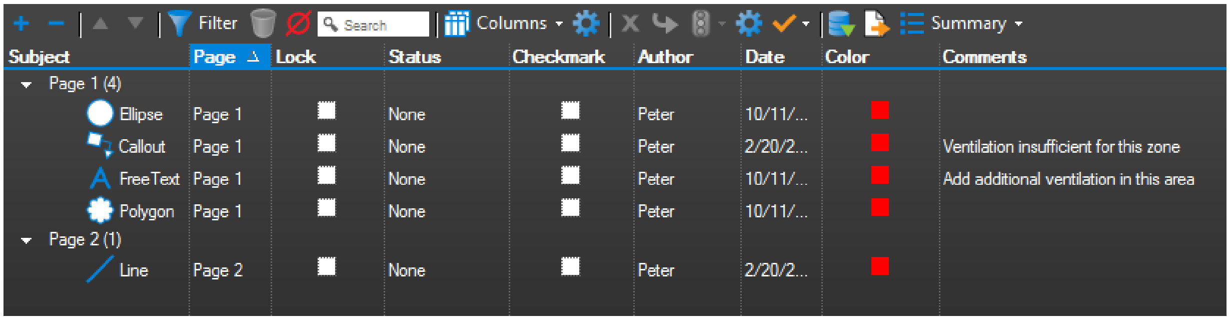
Export: Exports all markups to an XML file. The XML file can be imported into another PDF so that the markups will be displayed in the target PDF. The XML file can also be imported into Excel for viewing in a tabular form. Markups may also be exported to the FDF format for interoperability with other PDF applications.

Summary: Publishes a report of all the markups in a PDF. A PDF Summary can be saved as a separate PDF or appended to the end of the current PDF. It is also possible to export a Summary as CSV or XML data for use in Excel or other programs.

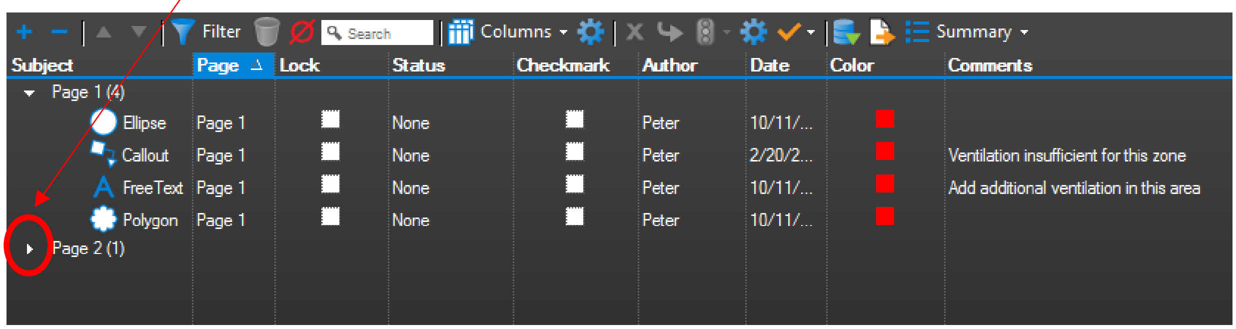
6.3 Organizing Columns

Lesson objectives	By the end of this lesson, learners will be able to: • Explain the relationship of the active Profile to the order & display of columns in the Markups list. • Turn columns on & off. • Change the arrangement of columns in the Markups list.

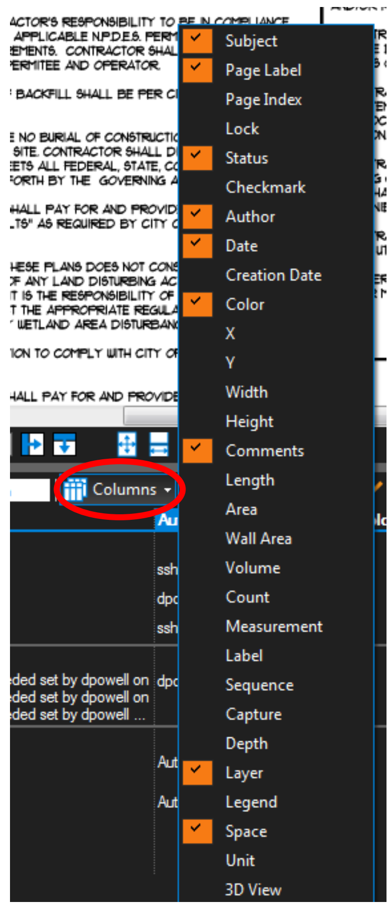
- The Markups list displays a table with each row representing a markup that has been added to the active PDF. Each column displays information about the markups.



- As a row is selected, the view of the PDF in the workspace will jump to the location of the associated annotation. This makes it easy to use the Markups list to step through the annotations in PDF with the **Previous** & **Next** buttons, or by using the keyboard shortcuts of the **Up** & **Down** arrow keys.
- Horizontal section separators with disclosure triangles show & hide each section of the Markups list. Click a disclosure triangle to show or hide that section.



- To turn columns on & off, **Select** the tool sets you wish to display or **deselect** the tool sets you wish to hide. The **Columns** menu allows you to toggle various columns on & off. A column that is turned on will appear in the top row of the Markups list & will display a check box next to the name in the menu. Click a column name to turn it on or off. To sort by any column, click the column's name on the header. Click again to reverse the sort order.



- To change the arrangement of columns in the Markups list. Similar to other programs, simply **Left-Click, Drag & Drop** the column to the desired location within the Markups List.

For more information on the **Managing & Creating Columns** click the hyperlink to the right [Managing & Creating Columns in Markups List Online Support]

6.4 Sorting Data in the Markups List

Lesson objectives

By the end of this lesson, learners will be able to:

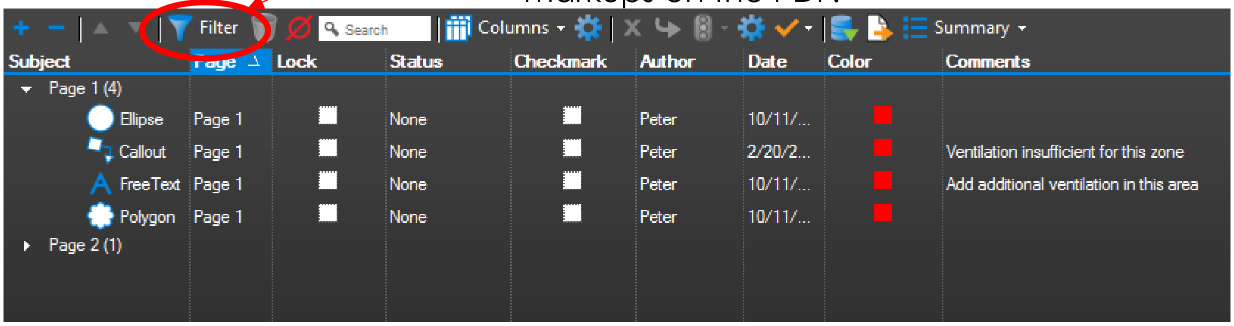
- Sort data in the Markups list using any of the visible columns.
- Differentiate between the functions of sorting categories & sorted column information.
- Collapse & expand any sorting category in the Markups list.

6.5 Filtering Data

Lesson objectives

By the end of this lesson, learners will be able to:

- Filter data in the Markups list using the filter button & any of the visible columns.
- Be able to distinguish filtered & unfiltered markups on the PDF.



For more information on the **Filtering Data** click the hyperlink to the right

[Filtering Data Online Support]

6.6 Statuses

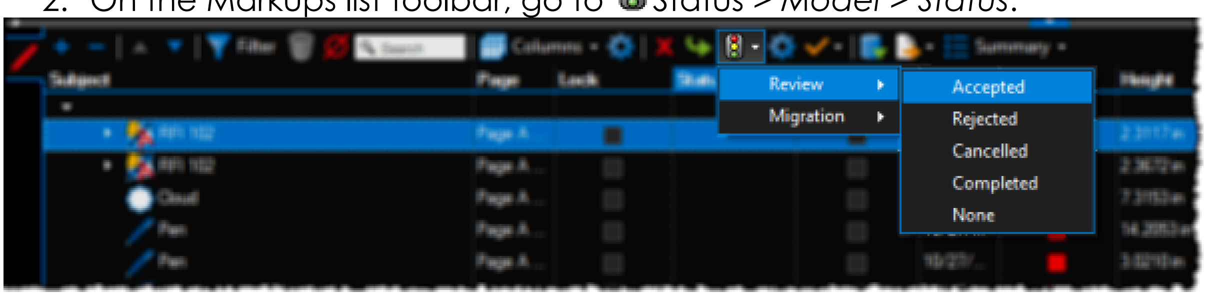
Lesson objectives

By the end of this lesson, learners will be able to:

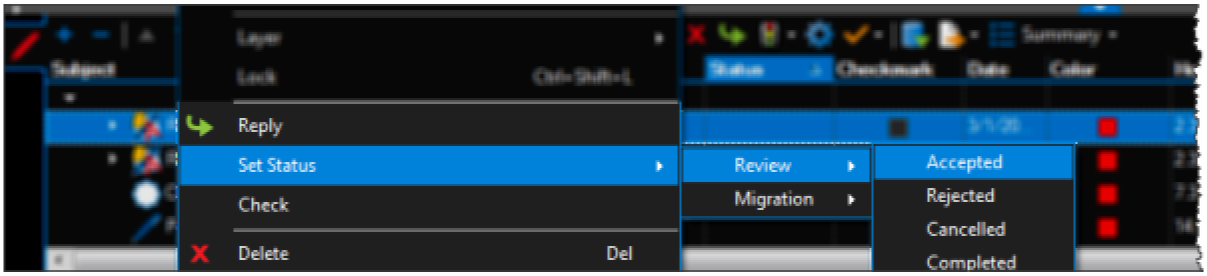
- Set status on a markup.
- Understand that statuses stack on top of each other or "cascade" when they are changed with the author information & a time stamp & date.

To apply a status to a markup:

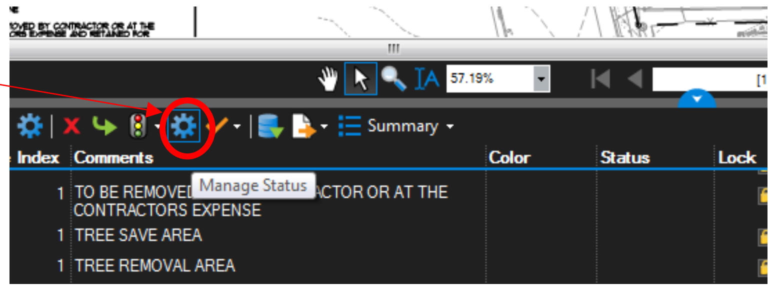
1. **Select** the markup in the Markups list.
2. On the Markups list toolbar, go to Status > *Model* > *Status*.



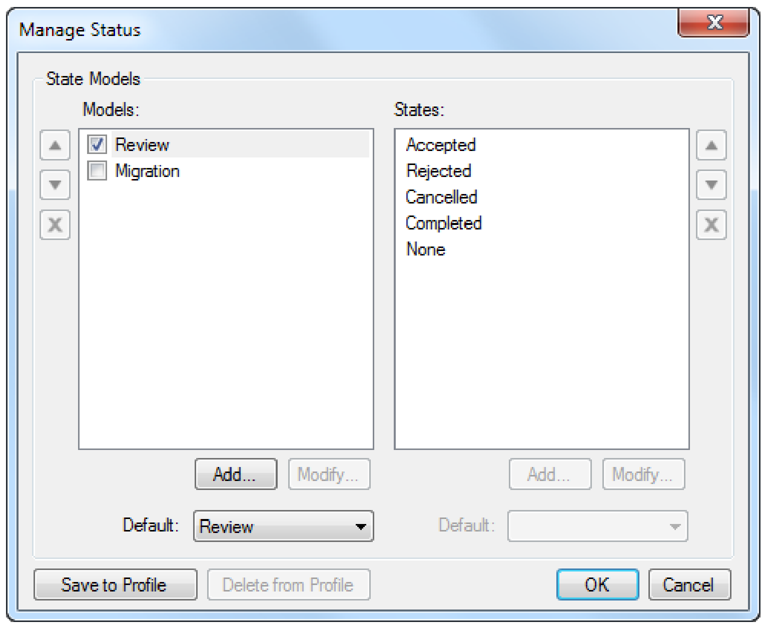
Alternatively, right-click the markup in the main workspace or in the **Markups list** & go to **Set Status** > *Model* > *Status*.



On the **Markups list** toolbar, click **Manage Status**. The **Manage Status** dialog box appears.



The **Manage Status** dialog box appears. Select one or both of the preloaded models you'd like to use.



The procedure outlined above describes creating a custom status in general. For a specific example, see Tutorial: Creating a Custom Status for the Markups List.

6.7 Custom Columns

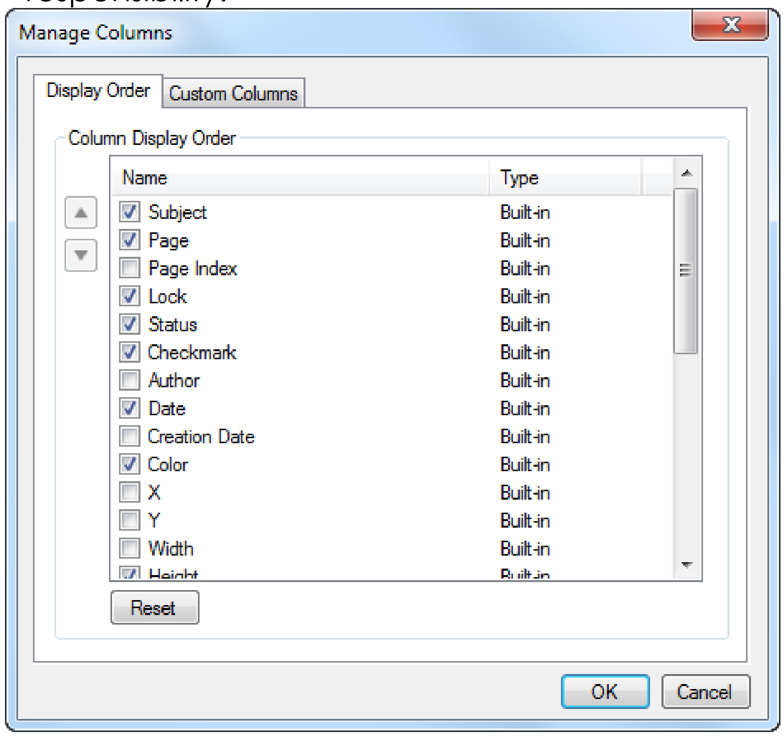
Lesson objectives

By the end of this lesson, learners will be able to:

- Add custom columns to the ones that are built-in.
- Create a custom text column to assign responsibility.

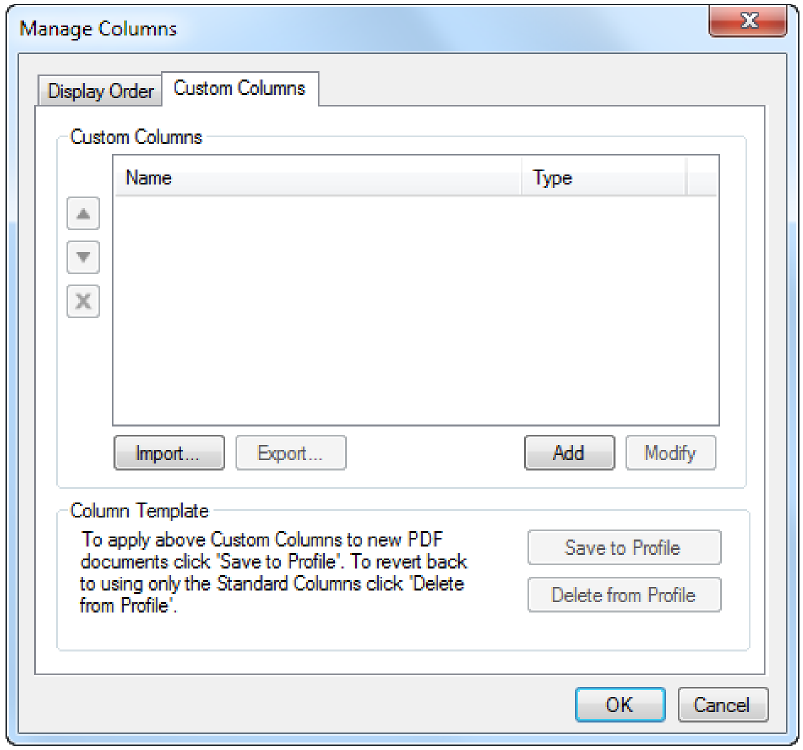
To control which columns are displayed in the Markups list & in what order.

1. On the **Markups list** toolbar, click **Manage Status**. The Manage Status dialog box appears.
2. Click **the Display Order** tab.
3. Check or uncheck columns, as desired. Checked columns are shown, unchecked columns are hidden.
4. Select a column & use the **Up** or **Down** button to move it into the desired position. Columns are shown in the order found here.

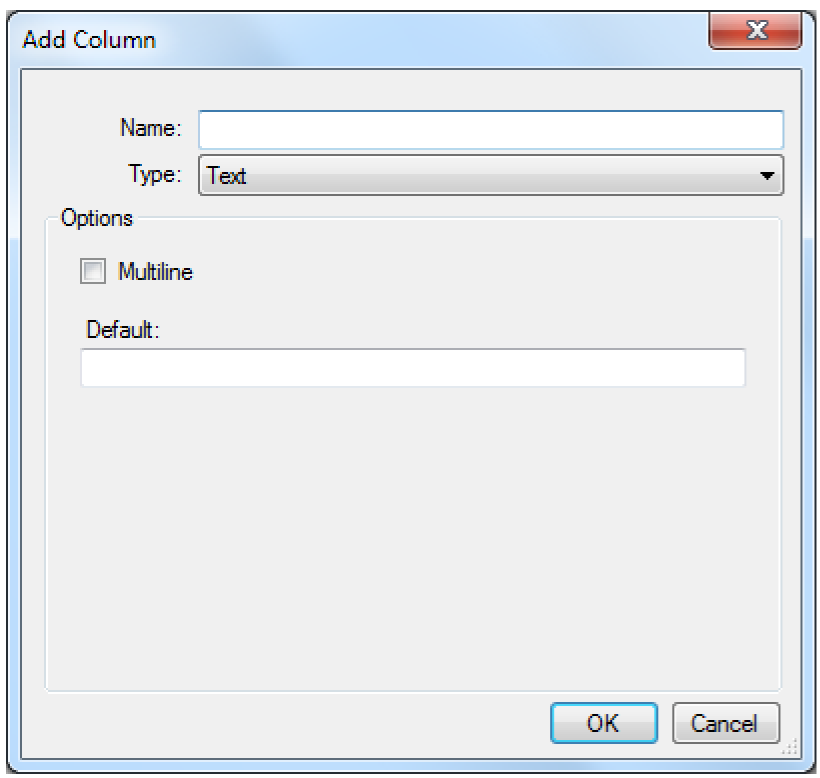


- Create a custom text column to assign responsibility.

1. On the **Markups list** toolbar, click **Manage Status**. The Manage Status dialog box appears.
2. Select the **Custom Columns** tab. All custom columns are listed.



3. Click **Add**. The **Add Column** dialog box appears.



4. Enter a display name for the column in the **Name** field.
5. Select **Text** from the **Type** list.
6. To wrap text so that it appears on multiple lines if it is longer than the available space in the **Markups list**, check **Multiline**.
7. Enter default text to be added with every new markup in the **Default** field.
8. Click **OK**.

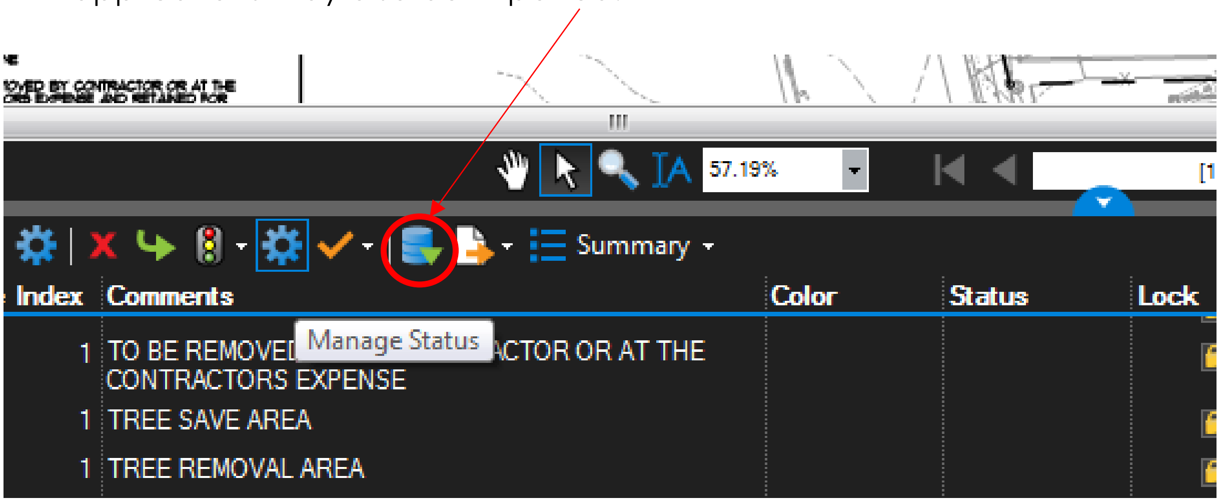
6.8 Importing Comments From Other PDFs

Lesson objectives

By the end of this lesson, learners will be able to:

- Import comments from other PDFs into their PDF using the Import button in the Markups list.

Import: Takes the markups from a PDF or an XML file & includes them in the active PDF (this is useful for incorporating & reviewing markups or feedback from multiple sources). FDF files containing annotations generated from other PDF applications may also be imported.



6.9 Exporting Markup Data

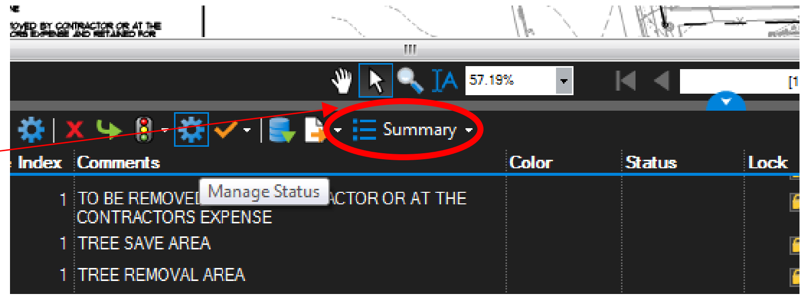
Lesson objectives

By the end of this lesson, learners will be able to:

- Export their markup data to a PDF Summary.
- Exclude filtered markups & hidden columns in their PDF Summary.
- Append the PDF Summary to the current PDF & create hyperlinks from the summary to the location of the markup on the PDF.
- Change the title, style, preview size, padding, page size & page orientation of their PDF Summary.
- Export their markup data to a CSV Summary that will open in Excel.
- Exclude filtered markups & hidden columns in their CSV Summary.
- Include column headers in their CSV Summary.
- Include markups & totals, or just markups or just totals, in their CSV Summary.

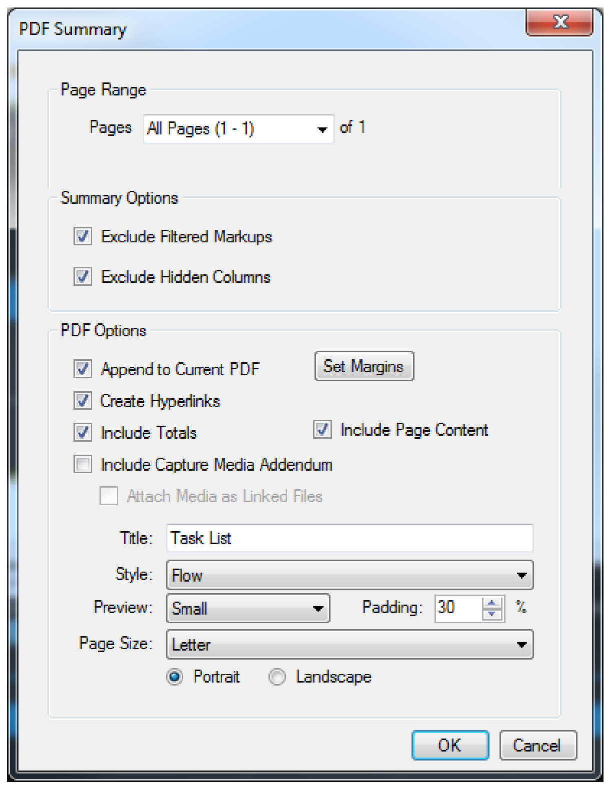
To export markup data to a PDF Summary

1. On the **Markups list** toolbar, click **Summary** & select the desired Summary type.



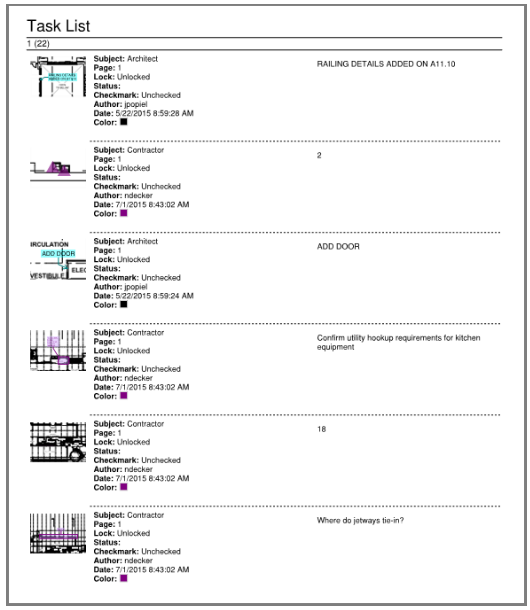
2. Configure the desired settings (see below for details regarding settings for each type of summary) & click **OK**.

- For your convenience, I included the steps for the configuration to the right for ease of creating a report.
- **Generate** the PDF Summary **using the settings to the right**.



Information

The resulting PDF Summary will appear similar to the report shown on the next page.



Task List

1 (22)

Subject: Architect
Page: 1
Lock: Unlocked
Status:
Checkmark: Unchecked
Author: jpopiel
Date: 5/22/2015 8:59:28 AM
Color: ■

RAILING DETAILS ADDED ON A11.10

Subject: Contractor
Page: 1
Lock: Unlocked
Status:
Checkmark: Unchecked
Author: ndecker
Date: 7/1/2015 8:43:02 AM
Color: ■

2

Subject: Architect
Page: 1
Lock: Unlocked
Status:
Checkmark: Unchecked
Author: jpopiel
Date: 5/22/2015 8:59:24 AM
Color: ■

ADD DOOR

Subject: Contractor
Page: 1
Lock: Unlocked
Status:
Checkmark: Unchecked
Author: ndecker
Date: 7/1/2015 8:43:02 AM
Color: ■

Confirm utility hookup requirements for kitchen equipment

Subject: Contractor
Page: 1
Lock: Unlocked
Status:
Checkmark: Unchecked
Author: ndecker
Date: 7/1/2015 8:43:02 AM
Color: ■

18

Subject: Contractor
Page: 1
Lock: Unlocked
Status:
Checkmark: Unchecked
Author: ndecker
Date: 7/1/2015 8:43:02 AM
Color: ■

Where do jetways tie-in?

Activity – Lesson Review: Pop Quiz!

- **What can you do with columns in the Markups list?**

  Answer: Filter, sort, turn on & off, & move.

- **What happens to markups that are filtered out of the Markups list on the PDF?**

  Answer: They turn gray on the PDF.

- **What happens to the status of a markup when you update it?**

  Answer: It stacks on top of the previous status with a time stamp & date.

- **How would you merge comments from multiple PDFs onto one file?**

  Answer: Use Import Comments.

- **Which summary report of the Markups list includes the option to append to the current PDF?**

  Answer: PDF Summary.

- **Which summary would you create to access your Markups list information in Excel?**

  Answer: CSV Summary.

7.0 PDF Creation

7.1 Module Overview

Lesson objectives

By the end of this lesson, learners will be able to:

- Create a new blank PDF using the **New** button.
- Create a new PDF based on an existing template using the **New** button.
- Convert any file to PDF using the Bluebeam PDF printer.

7.2 New PDF Creation

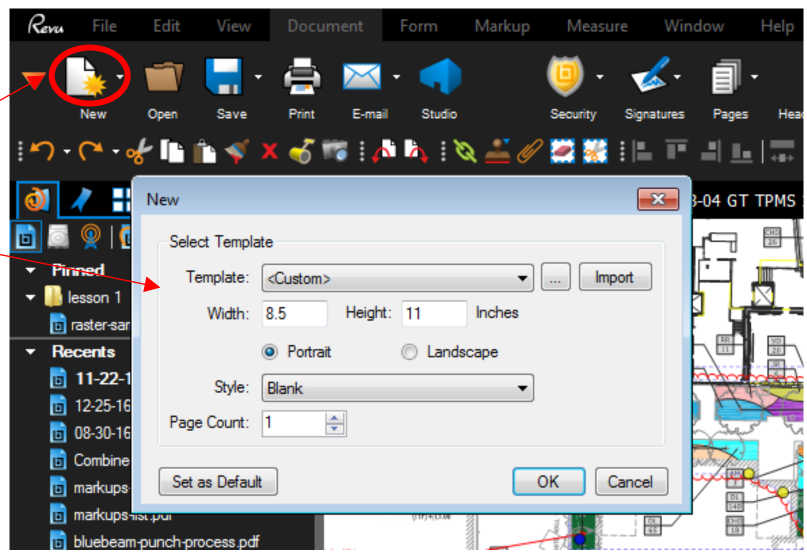
Lesson objectives

By the end of this lesson, learners will be able to:

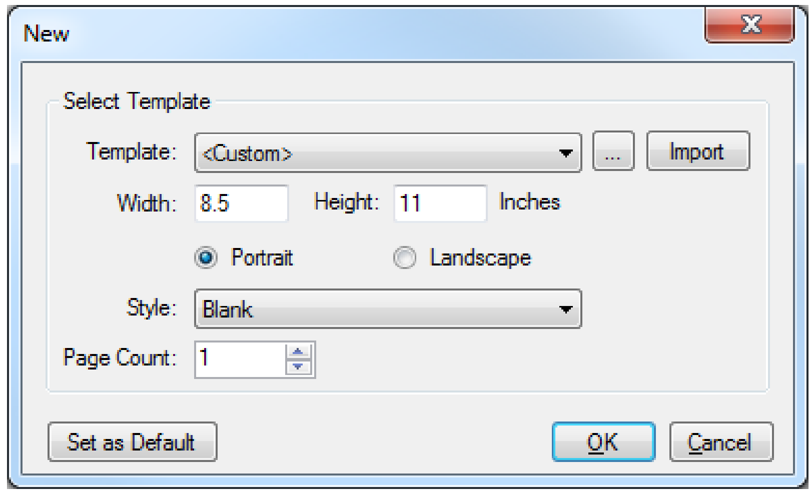
- Create a new blank PDF using the **New** button.
- Create a new PDF based on an existing template using the **New** button.

Create a new blank PDF using the New button.

1. Go to **File > New.** The **New** dialog box appears.
2. To set the PDF to a standardized size, select it from the **Template** menu. Otherwise, select **<Custom>**.
3. Define the size of the pages in the PDF by setting the **Width** & **Height**.
4. If a standardized size was selected in the previous step, these options are unavailable as those settings are inherent to the selection.



5. Determine the page orientation by selecting either **Portrait** (vertical) or **Landscape** (horizontal).
6. Select the desired style for the PDF from the **Style** menu.
7. For a blank PDF, select **Blank**.
8. Determine the number of pages in the PDF by entering the desired value in the **Page Count** field.
9. By default, a new, empty PDF in Revu has the settings shown in the image above (essentially, a single sheet of blank, 8.5 x 11 paper with a Portrait orientation). If you would like to use the current configuration as the default for new, empty PDFs, click **Set as Default**.
10. Click **OK**.



7.3 Using the Bluebeam PDF Printer to Create PDFs From Virtually Any Program

Lesson objectives

By the end of this lesson, learners will be able to:

- Convert any file to PDF using the Bluebeam PDF printer.

The Bluebeam PDF printer can be accessed from the File > Print menu of Microsoft Word.

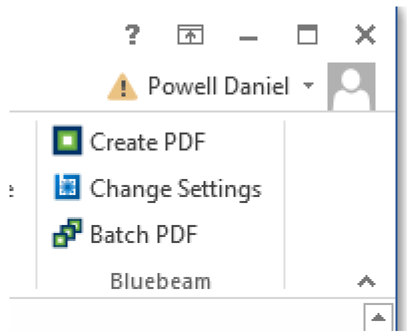
7.4 PDF Creation Using Bluebeam's Plugins

Lesson objectives

By the end of this lesson, learners will be able to:

- Create a PDF with a single click from Microsoft Word, Excel or PowerPoint.
- Bluebeam Revu has plugins for 2D PDF creation from AutoCAD, Revit & SolidWorks.
- Bluebeam Revu has plugins for 3D PDF creation from Revit, Navisworks & SketchUp Pro.

- **Select** plug-ins similar to the one on the right in Microsoft Word, Excel or PowerPoint.



For more information on **PDF Creation** click the hyperlink to the right

PDF Creation Video Tutorial

8.0 Document Management & Setup

8.1 Module Overview

Lesson objectives

By the end of this lesson, learners will be able to:

- Describe, in general terms, the benefit of document management & setup to AEC workflows.

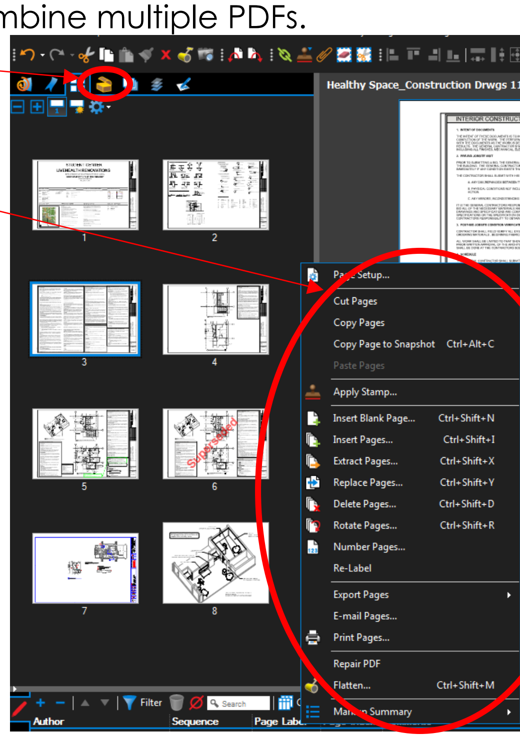
8.2 PDF Manipulation

Lesson objectives

By the end of this lesson, learners will be able to:

- Locate & use the **Thumbnails** tab
- Access & use functions in Thumbnails tab from the Document Command bar.
- Using the right-click functionality:
    - Add a blank page to their PDF
    - Add a page from another PDF
    - Copy & paste multiple selected pages
    - Delete one or more pages
    - Rotate a single page or a range of pages
    - Rearrange pages from one place to another.
    - Relabel & typing new text
    - Extract pages as separate PDFs
    - Combine multiple PDFs.

- Thumbnails tab
- Right-Click Menu



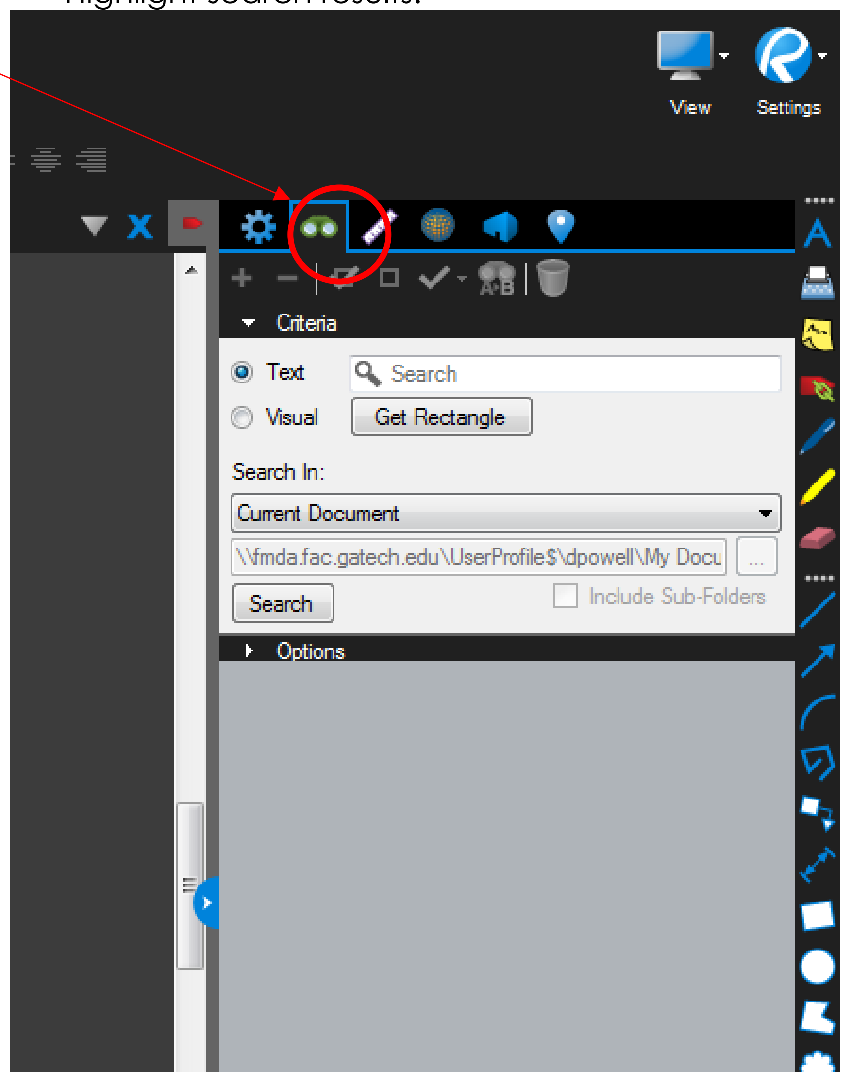
8.3 Search: Text & VisualSearch

Lesson objectives

By the end of this lesson, learners will be able to:

- Search for text in a PDF with searchable text.
- Use text search options in the Search panel.
- Use Visual Search to find non-text content
- Can search all open documents, their recent documents, a folder, or their current Studio Project for either text or a visual cue.
- Select a number or all of their search results.
- Highlight search results.

- Search Tab



For more information on **Searching** click the hyperlink to the right

[Search Video Tutorial]

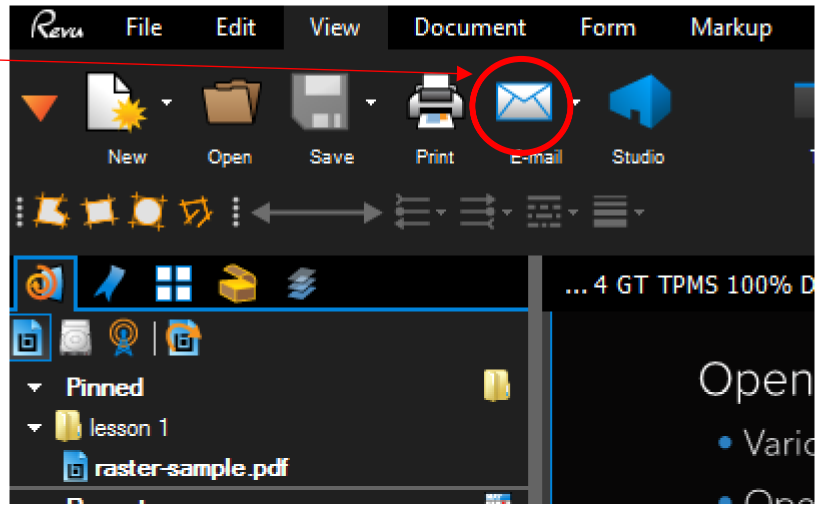
8.4 Emailing & Exporting PDFs

Lesson objectives

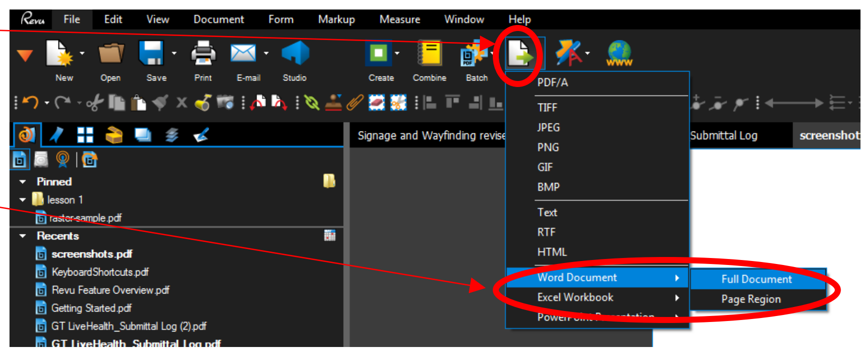
By the end of this lesson, learners will be able to:

- Attach the current PDF to an email & send it using the Email button.
- Export a full document to Microsoft Word.
- Export a table in a PDF page region to Microsoft Excel.

- Email button is always located with the 6 permanent icons located on the Command Bar



- Export full or portions of a documents to Microsoft Word & Excel



Activity – Module 8 Review: "Pop Quiz!"

- **Which tab would you use to reorder pages in a multi-page PDF?**

  Answer: The Thumbnails tab.

- **How would you identify that text on a PDF is searchable?**

  Answer: If it can be selected by the Select Text tool, then it's searchable.

- **What can you search for within the Search tool in Revu? (It's okay to use Revu to answer!)**

  Answer: Textual & visual elements.

- **You can use Revu's Search tool to search through which items?**

  Answer:
  1. Current Document
  2. Current Page
  3. All Open Documents
  4. All Recent Document
  5. A folder of documents

- **Can you email a PDF from Revu?**

  Answer: Yes.

- **If you wanted to edit a PDF in Microsoft Word, how would you convert it to a Word document?**

  Answer: You would export the page to a Word document.

9.0 Introduction to Studio

9.1 Module Overview

Lesson objectives

By the end of this lesson, learners will be able to:

- Use Studio to save time
- Recognize the differences between **Studio** vs. **screen-sharing**
    - With screen-sharing, I might display my screen with one or more of you over, say, a software service like GoToMeeting or WebEx, to collaborate on a document.
    - If any—or all—of you have comments you want placed on that document, then you might audibly tell the host those comments, & they would mark them on the document manually for you.
    - However, there's an issue with doing this among collaborators in the **AEC industry**—& that has to do with the **integrity** of the **comments** you gave for the host to markup on the document.
    - If the host fails to capture your comments **exactly** as you intended, then that carries potential **liability** for the **host**.
    - **Bluebeam** captures comments **exactly as you intended them**—especially if they are to be associated with you on official documents.
    - In **contrast** to **screen-sharing** technology, **Studio Sessions** empowers you & all other collaborators to place the markups **directly** on the **document yourselves**, rather than relying on the host—or some other facilitator—to place them for you.
    - Further, **Studio Sessions** technology gives you & other collaborators the **flexibility** to place your individual comments on the document **synchronously**—meaning, at the **same time**—or **asynchronously** (at **different times**).

9.2 Differences Between Studio Sessions & Studio Projects

- In **Studio Sessions**, everyone can work on the same documents together at the same time. By contrast, **Studio Projects**, which is a document management system, allows only one person to work on a document at a time.
- Only PDF type files can be used in **Studio Sessions,** but any file type can be used in **Studio Projects.**
- Up to 500 people can collaborate in a **Studio Session**, but the number of participants for a **Studio Project** is unlimited.

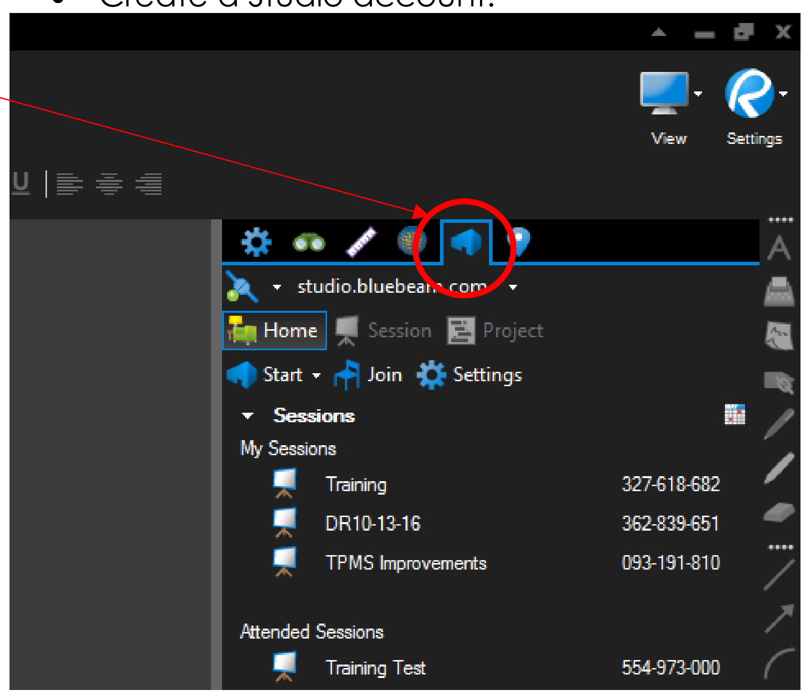
9.3 Getting In to Studio

Lesson objectives

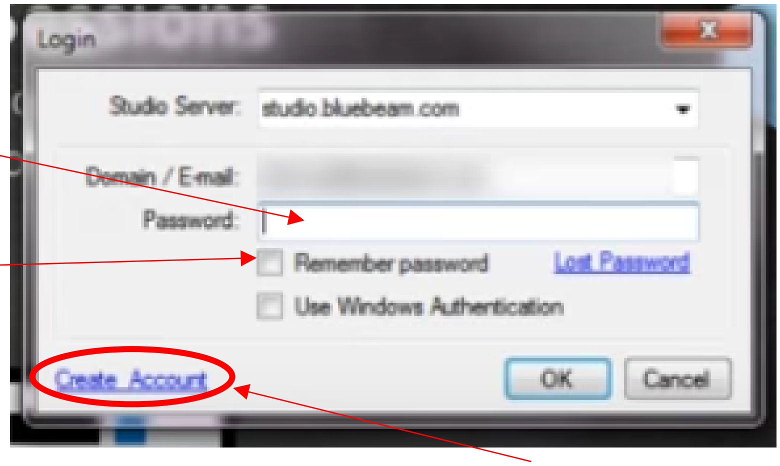
By the end of this lesson, learners will be able to:

- Access the Studio tab & log in.
- Create a Studio account.

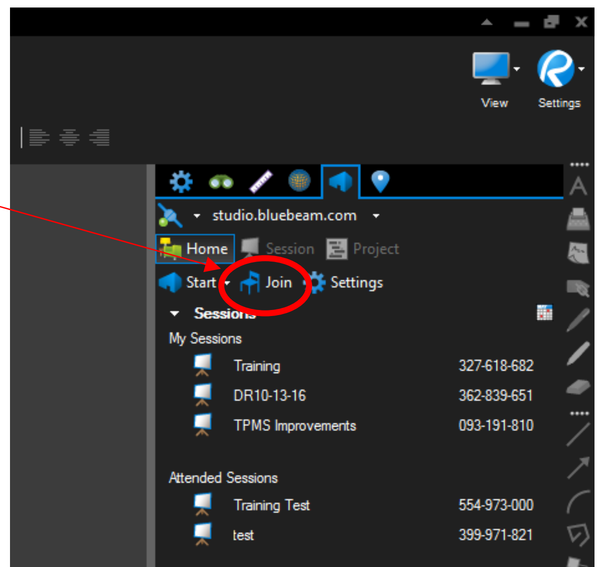
- Access the Studio tab



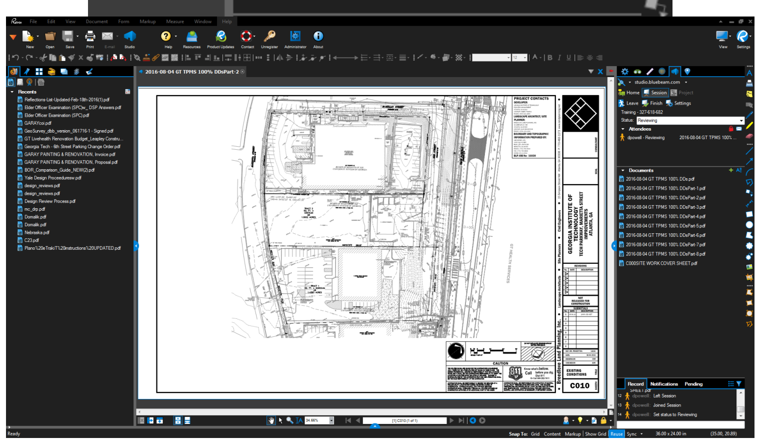
- If you already have an account, you will only need to provide your **Password**.
- Don't forget to check the box so Studio remembers your password



- If you don't have an account, you'll need to click on "Create Account"
- The **Create Studio Account** dialog will display
- Type your **E-mail** address
- Type & confirm your **Password**
- Type your **Name**. The default is your Windows login ID
- Click **OK**
- A screen similar to the one on the right will appear & select the appropriate **Session** to join.



- Once you select a **Studio Session** to join & the desired drawing to view a screen similar to the one to the right will appear



Activity – Module 9 Review: "Pop Quiz!"

- **Which is the collaboration tool that allows you to markup documents in real time or on your own time?**

  Answer: Studio Sessions.

- **Of the following file types, which ones does Studio Sessions support?**
  - **Excel**
  - **DWG**
  - **DOCX**

  Answer: (Trick question!) None of them. Studio Sessions only supports PDF documents. (On the other hand, Studio Projects is the feature that supports any document type.)

- **Which of the Studio features supports all file types?**

  Answer: Studio Projects.

- **How much free storage space do you get in Studio Projects?**

  Answer: Unlimited.

- **What information is needed to set up a Studio account?**

  Answer: Name & email address only.

10.0 Studio Sessions

10.1 Module Overview

Benefits of using Studio Sessions for Digital Design Review:

- Don't have to print, copy, deliver, mail, courier or travel to another location
- Can see all of the comments as they are entered
- Someone does NOT have to gather & transpose the markups
- Stakeholders can review & add markups from their own PCs from anywhere & at anytime
- Reduces/eliminates redundancies
- Comments can easily be compiled
- Single source of truth
- All can work simultaneously

10.2 Setting Up a New Session

Lesson objectives

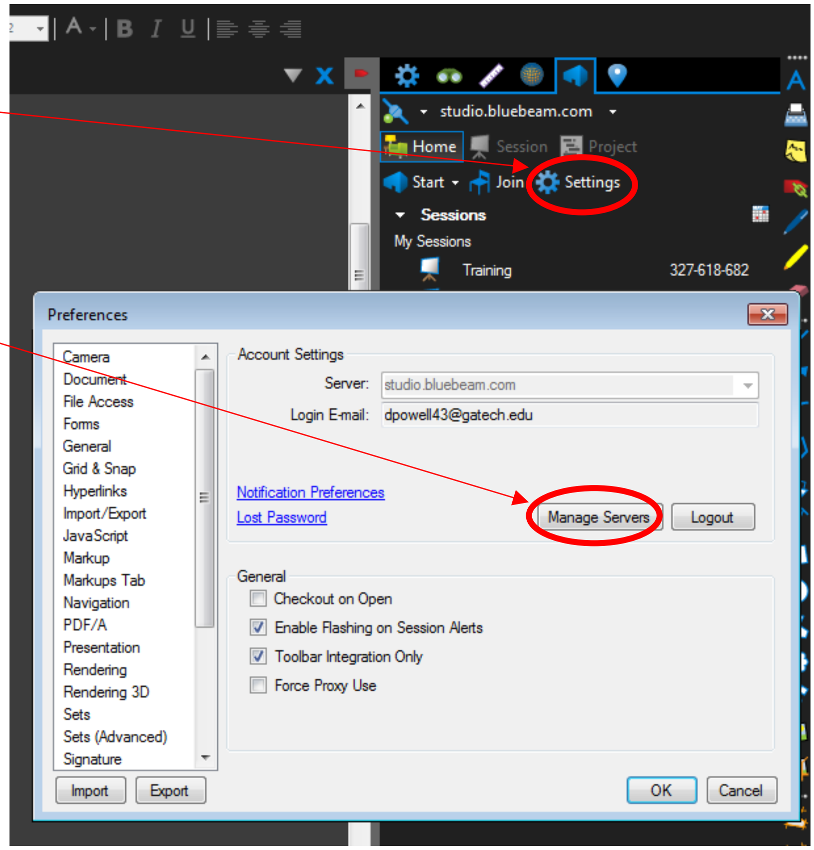
By the end of this lesson, learners will be able to:

- Set up a new Studio Session.
- Upload PDFs to a Studio Session during creation.
- Turn the default permissions on & off & restrict attendees by email during the creation of a new Studio Session.
- Describe the value of setting an expiration date for a Studio Session.
- Invite colleagues to join them in a Studio Session by typing in the email address.
- Describe how they can invite attendees to a Studio Session using their email address book.

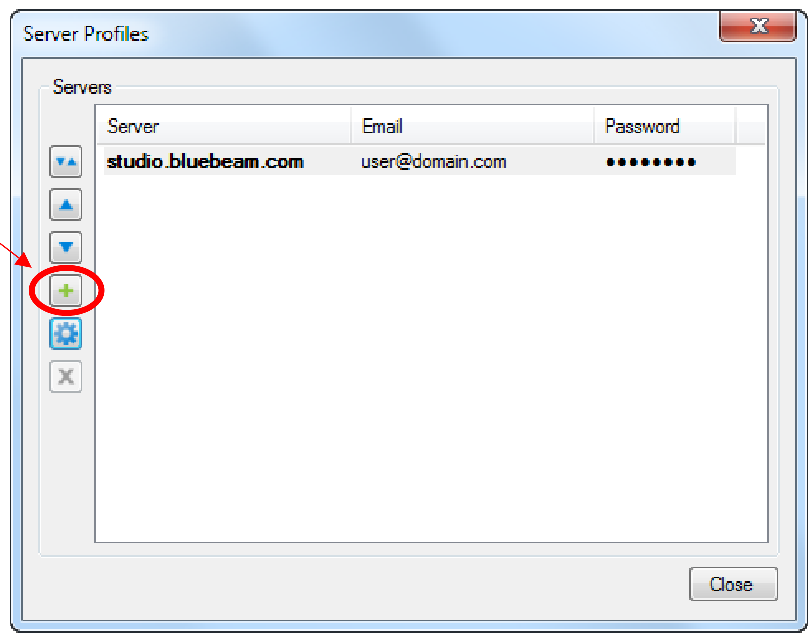
- **Create Studio Account**

Go to **View** > **Tabs** > **Studio** or press ALT+C to access the Studio tab.

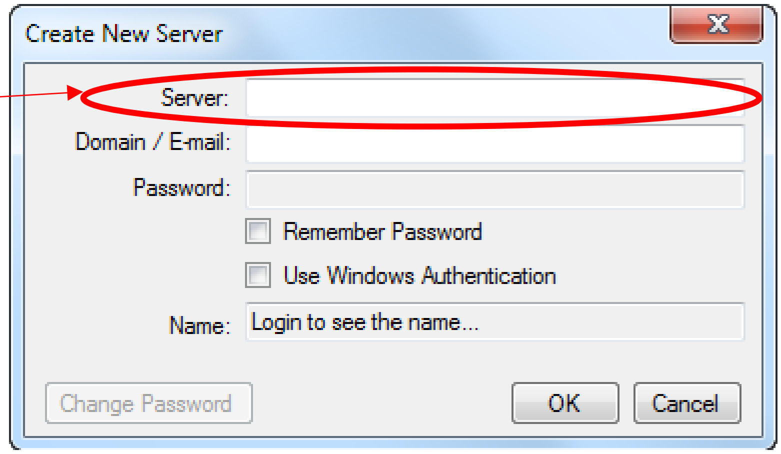
- Click **Settings** on the **Studio** tab. The **Preferences** dialog box opens to the Studio preferences.
- Click **Manage Servers**.



- The **Server Profiles** dialog box appears.
- Click & the **Create New Server** dialog box appears (see next page)



- Once the **Create New Server** dialog box appears, enter the name of the Studio sever in the **Server** field

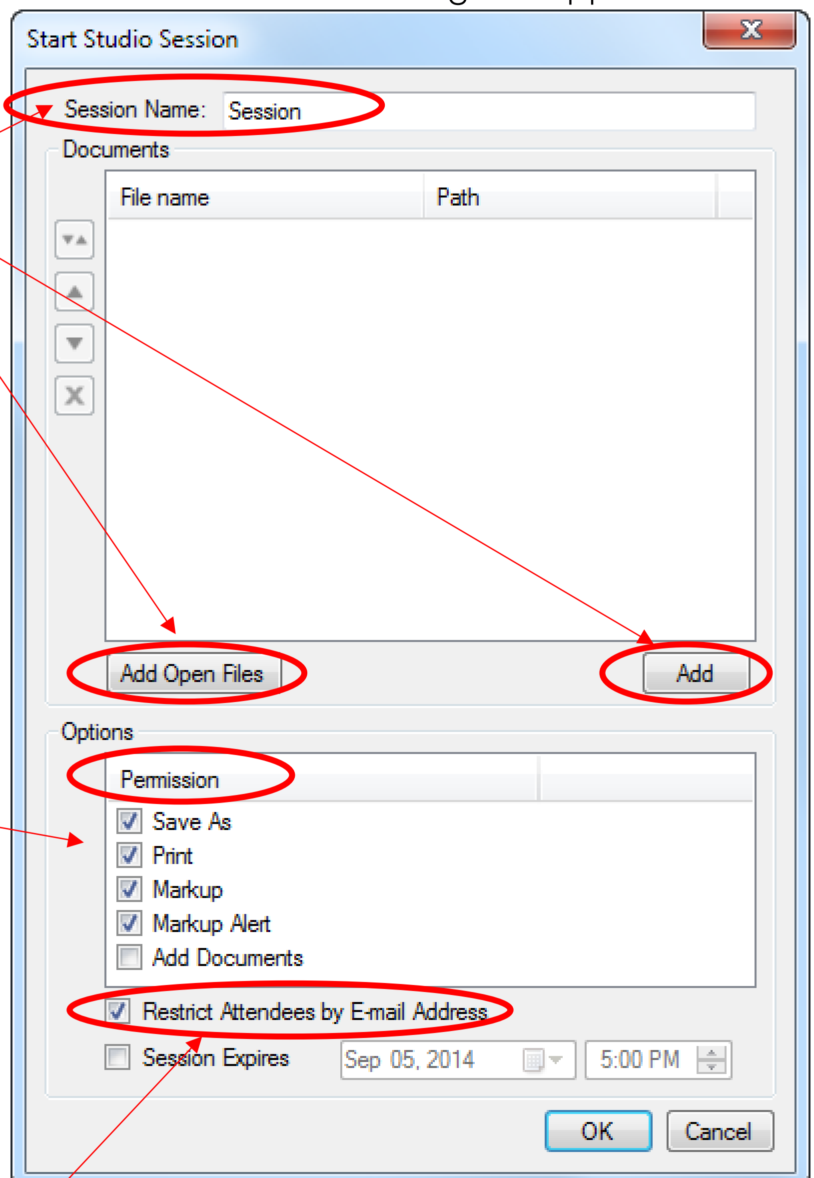


- If this Studio server has been configured to use Active Directory & you would like to use your Windows login, select **Use Windows Authentication**.
    - The **Domain / E-mail** field will be automatically populated when this option is selected.
- If this Studio server has not been configured to use Active Directory or if you would prefer to log in using your email address:
    - Enter your email address in the **Domain / E-mail** field.
    - Select **Remember password**.
    - Enter a password for this Studio account in the **Password** field.
- Click **OK**.

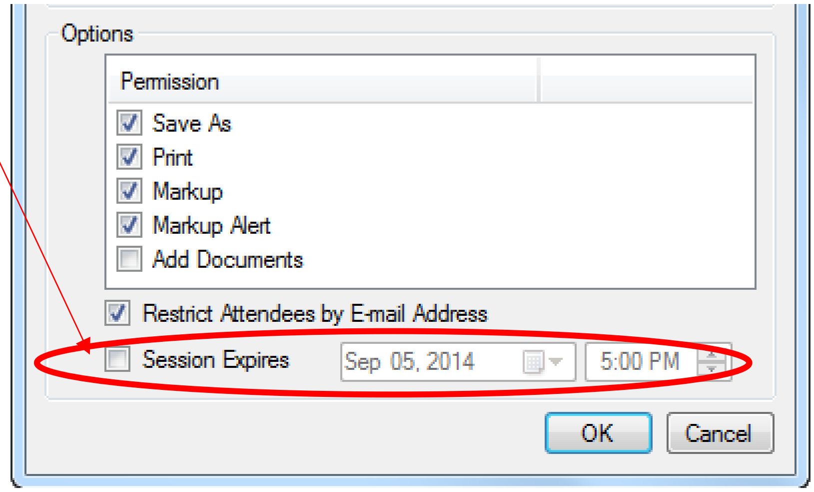
You will receive a verification email after you create the account. Follow the instructions in this email in order to complete the validation process. You must validate the email address or you will not be able to continue using the account.

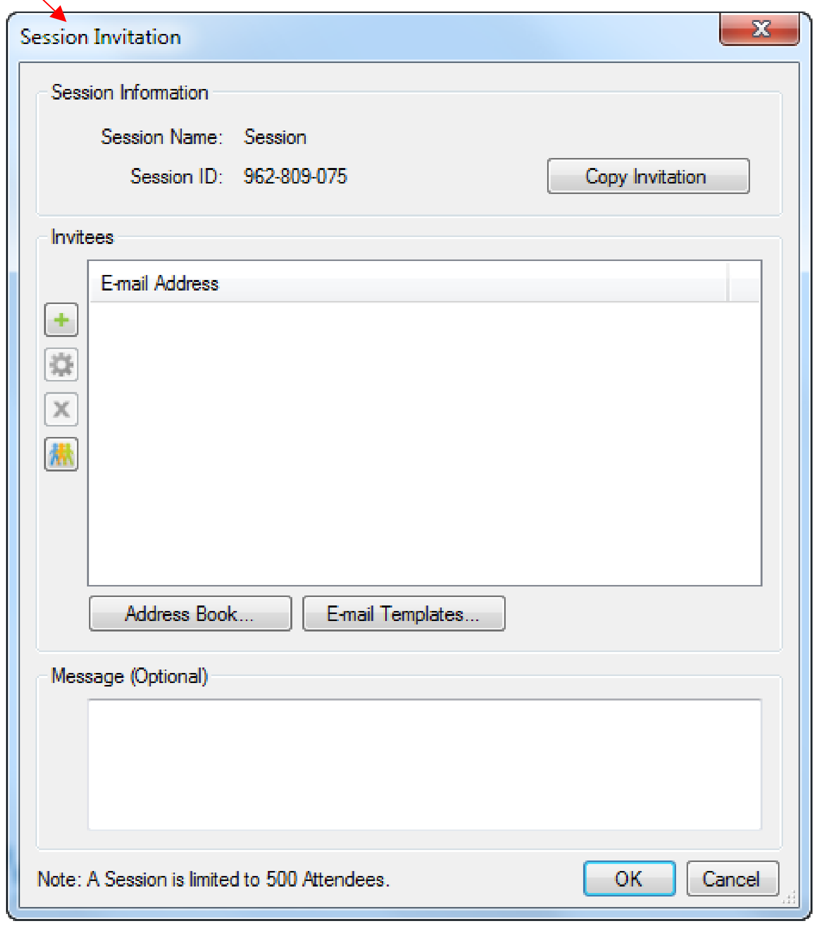
- **Setting up a new Studio Session**
- The dialog box to the right will appear
- Enter a **Session Name**
- Click **Add** to select PDFs to include in the Session, or click **Add Open Files** to add the files that are already open in Revu. Files can be added later, as well.
- Select the desired options from the **Permission** list. These will apply universal permissions to all Attendees. Check **Save**, **Print**, **Markup**, **Markup Alert**, or **Add Documents** to allow Attendees those permissions by default or uncheck them to remove those permissions from Attendees by default
- To restrict access to the Session by email address, select **Restrict Attendees by E-mail Address**. To allow any user with the Session ID to join the Session, uncheck this option

From the **Studio** tab, go to **Start** > **New Session**. The **Start Studio Session** dialog box appears



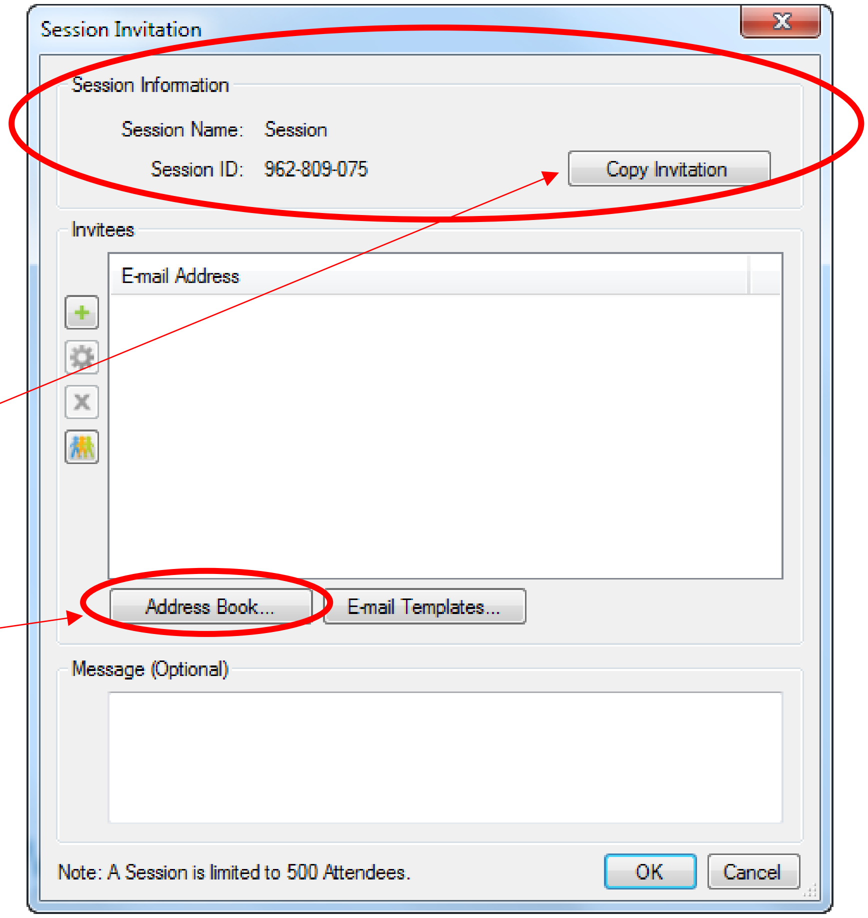
- To set an expiration date for the Session, select **Session Expires** & enter the desired expiration date & time. Expiration dates must be in the future; Revu will not allow a back-dated expiration date.
- Click **OK** to save the settings & upload the files. The **Session Invitation** dialog box will appear
- Inviting somebody to a Session automatically adds them as an Allowed Attendee in the Session Settings. In addition, the invitee is also sent an email containing information about the Session, as well as a link allowing them to automatically connect to the Session. If you do not wish to do this, click **Cancel** to create the Session without invitees. You can send an invitation later.



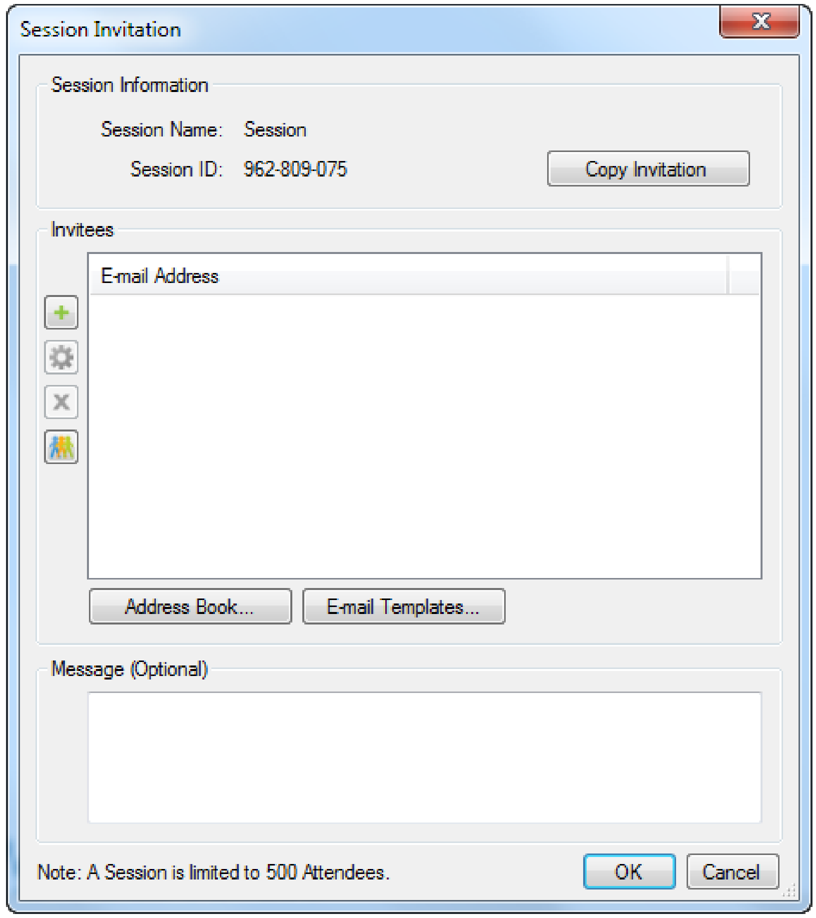


- The Session Information is shown at the top of the dialog box. To copy this information to the clipboard in order to paste it into another program, such as an email message, IM or other document, click **Copy Invitation**.

- To add invitees from the address book of your default email program, click **Address Book**.
- The email program must be MAPI compliant for Revu to access its address book. The address books from web-based email like Gmail, Hotmail or Yahoo **cannot** be accessed.



- To add invitees manually, click + . When the **Add E-Mail Address** dialog box appears, enter the invitee's email address & click **OK**
- To add all the members of an existing **Group**, click . When the **Select Groups** dialog box appears, select the desired Group & click **OK**
- To change the email address of an invitee, select the entry & click . When the **Modify E-mail Address** dialog box appears, enter the new email address & click **OK**
- To remove an invitee, select the entry & click **X**
- Enter a **Message** to add to the invitations, if desired
- Click **OK**. Email invitations will be sent to all the invitees from the Studio server



10.3 Live Session Participation

Lesson objectives

By the end of this lesson, learners will be able to:

- Join a Session. (See 9.3 Getting In to Studio)
- Place markups on a PDF in a Session. (See 3.0 The Markup Tools)
- Correctly state that markups placed in a Studio Session can only be edited by the attendee who placed them.
- Correctly state that custom columns need to be set up on their documents *before* they are uploaded to a Studio Session in order for the custom column(s) to appear in a Studio Session.
- Explain what type of information the Record pane tracks within a Studio Session.
- Understand that attendees can access a Studio Session using Bluebeam Vu.

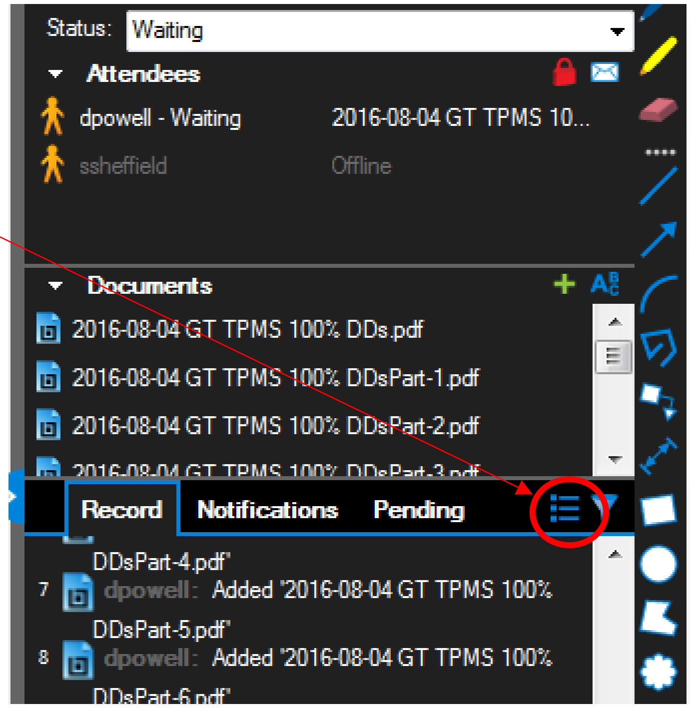
10.4 Record Reports

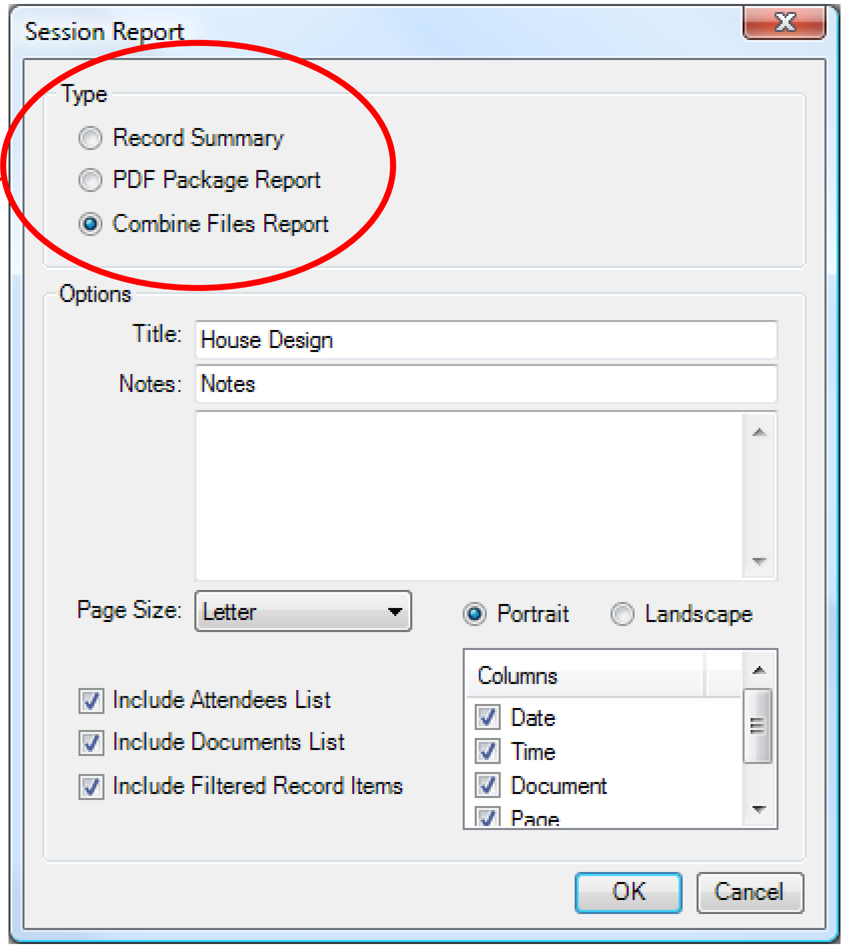
Lesson objectives

By the end of this lesson, learners will be able to:

- Create a PDF Package Record Report.

- Join the Session
- Click **Report** in the Record section of the Studio tab.

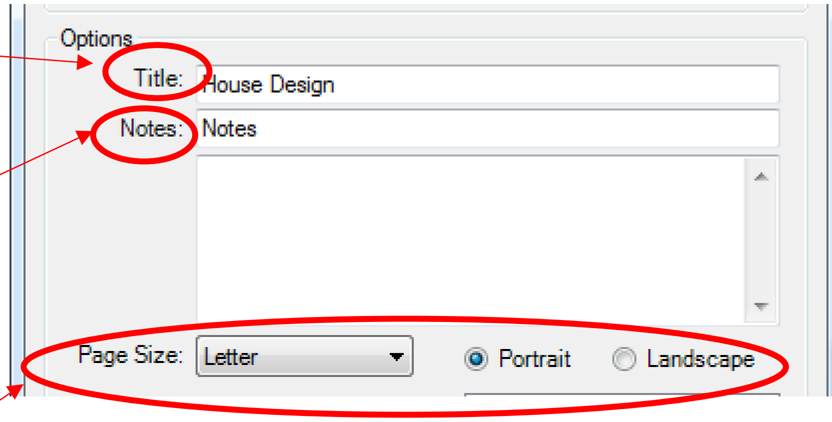




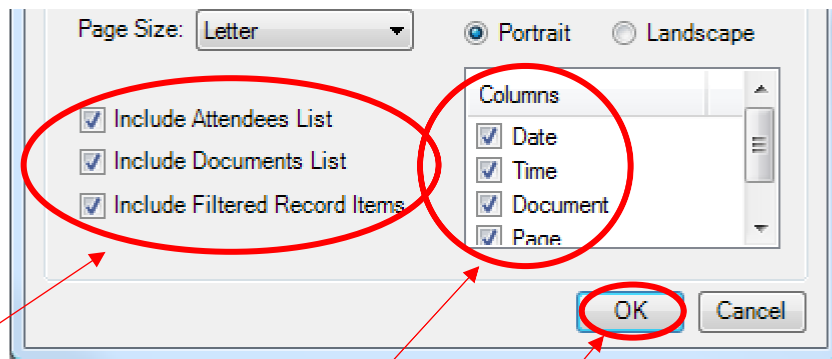
- The **Session Report** dialog box appears
- Click the **Type** of report that you would like to create:
- **Record Summary** creates a PDF file containing the contents of the Record section of the Studio tab.
- **PDF Package** Report creates a PDF package containing the Record Summary & all of the documents in the session.
- **Combine Files** Report creates a single PDF that contains the Record Summary & all of the documents in the session.

Note: The **PDF Package Report** & **Combine Files Report** contain hyperlinks in the Record Summary that link to the corresponding markup in the document – just like you are still within the session. This lets you review the Record & then jump to the markup in the document.

- Enter a **Title** for the PDF file or package that will be created.
- Enter a heading for any **Notes** you wish to include in the report & add the notes in the field immediately below.
- Select the **Page Size** & orientation (**Portrait** or **Landscape**).



- Select any or all of the following options:
- **Include Attendees List** will include a list of the Attendees in the Report Summary.
- **Include Documents List** will include a list of the Documents in the Report Summary.
- **Include Filtered Record Items** will include all Records in the Summary, even if they are not currently displayed because they have been filtered.
- **Select Date, Time, Document** &/or **Page** to include these Records columns in the Report.
- Click **OK** to create the Report.



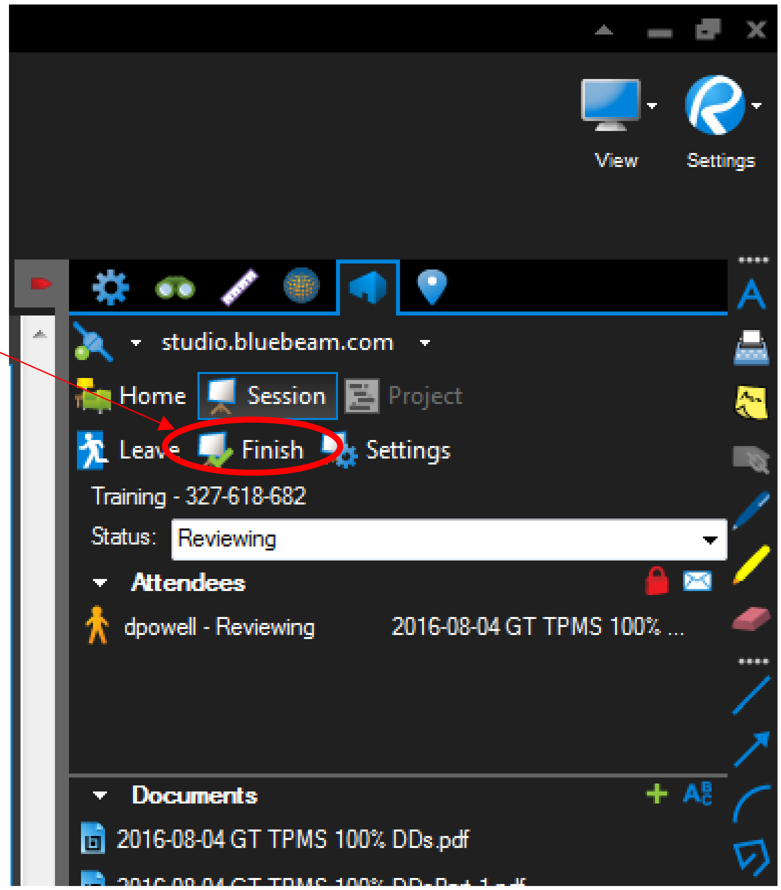
10.5 Closing Out a Studio Session

Lesson objectives

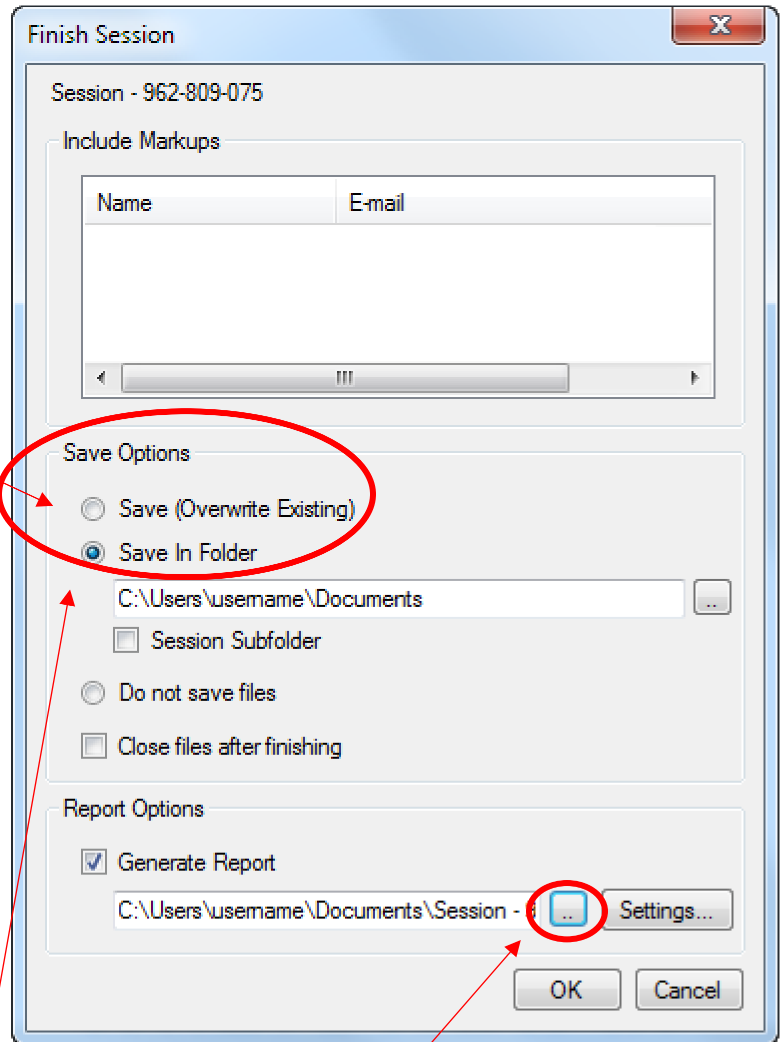
By the end of this lesson, learners will be able to:

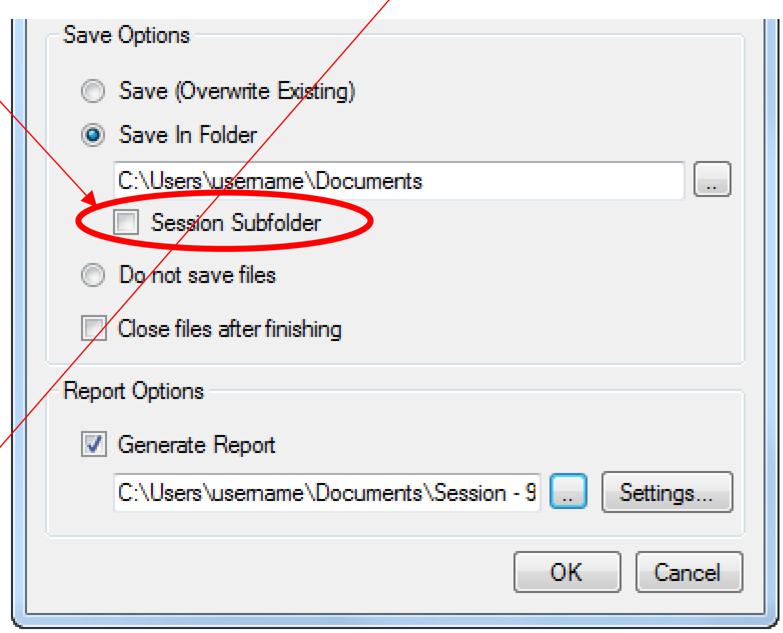
- Describe the difference between leaving & finishing a Session.
- Finish a Studio Session & save the files locally to their computer.
- Create a Record Report when they are closing out a Studio Session.

- Join the Session & ensure that nobody is in the Session working on any Session documents.
- Click **Finish** on the **Studio tab**. The **Finish Session** dialog box appears

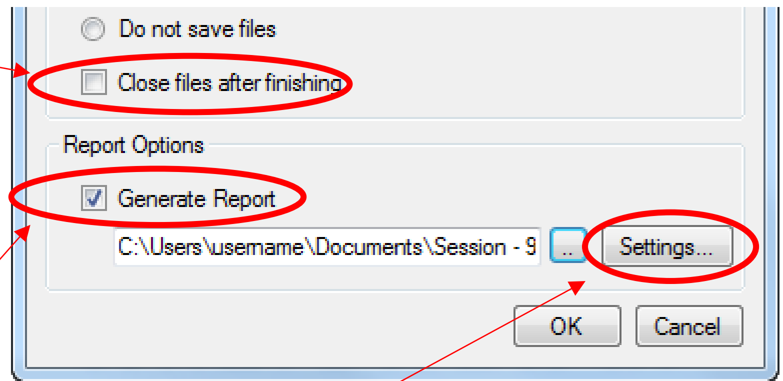


- To include the markups of specific Attendees in the Session documents that you choose to save, select those Attendees in the **Include Markups** list.
- Choose one of the **Save Options**:
  - **Save (Overwrite Existing)** saves the files back to the locations from which they were originally uploaded to the Session & overwrite any files with the same name that are currently there. This essentially replaces the original files with the ones from the Session. Do not choose this option if you need to preserve the original files & have not made backups already.
  - **Save In Folder** saves the Session documents in a specified folder. To change the default folder location, click .. & navigate to the desired folder.



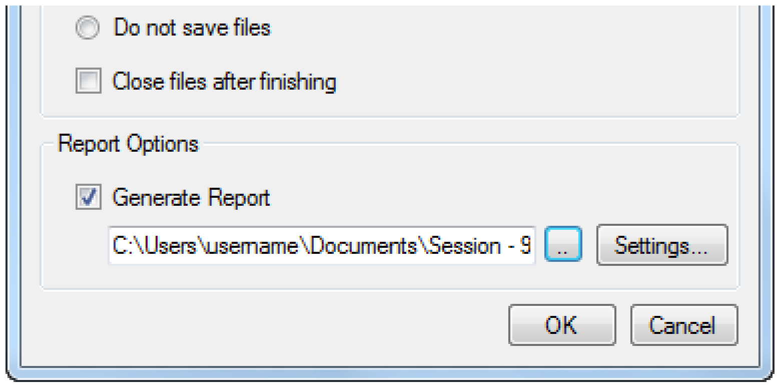


- Select **Session Folder** to create a subfolder with the Session name in the specified location.
- Select **Do not save files** discards the Session documents without saving them.
- Select **Close files after finishing** to automatically close any Session files that are currently open in Revu when the Session is finished, otherwise they will stay open.



- Select **Generate Report** to generate a **Session Report** before finishing the Session. To specify the Session Report settings, click **Settings**. The **Session Report** dialog box appears. See **Session Report** for more information about Session Report settings.
- The Session Report is saved in the folder specified in the field below. To change the default folder location, click  & navigate to the desired folder.
- Click **OK** to finish the Session.

- The Session & all of its files are permanently removed from the Studio server when the Session is finished. This cannot be undone.



- For more information on hosting, starting, configuring, managing, creating & finishing a **Session Click** on the link to the right.

[Bluebeam Studio Training Video](https://studio.bluebeam.com/share/ev45qg)

Direct download link to webinar:
https://studio.bluebeam.com/share/ev45qg

Activity – Module 10 Review: "Pop Quiz!"

- **Which of the following is something you cannot do when creating a new Studio Session?**
  - Restrict attendees by email.
  - Turn default permissions on & off.
  - Place markups on the page.
  - Set a Session expiration date.
- **What Revu programs can you use to access a Studio Session?**

  Answer:
  1. Revu Standard
  2. Revu CAD
  3. Revu eXtreme
  4. Revu iPad
  5. Vu
  6. Vu iPad

- **Can you create custom columns directly in a Studio Session?**

  Answer: No. You need to create your custom columns in Revu before uploading the document to the Studio Session.

- **Who can edit a markup placed on a document in a Studio Session?**

  Answer: Only the person who placed the markup can edit it in a Studio Session. (Even the Session administrator cannot edit a markup placed by any other attendee.)

- **What is the difference between *finishing* & *leaving* a Studio Session?**

  Answer: *Leaving* a Studio Session allows other attendees to continue working & gives you the opportunity to re-enter at a later date.

  Finishing a Studio Session kicks everyone out & closes the Session for good; it cannot be accessed again in the future.

11.0 Studio Projects

11.1 Module Overview

Lesson objectives

By the end of this lesson, learners will be able to:

- Explain, in general terms, how Studio Projects differs from Studio Sessions.

In an earlier module, you learned how the popularity of digital collaboration afforded by **Studio Sessions** increased the demand for access to documents **anytime** & **anywhere**.

In this module, you'll learn how to use **Studio Projects** to increase your — & your team's — productivity by gaining access to shared documents **anytime**/**anywhere**.

11.2 Setting Up a New Project

Lesson objectives

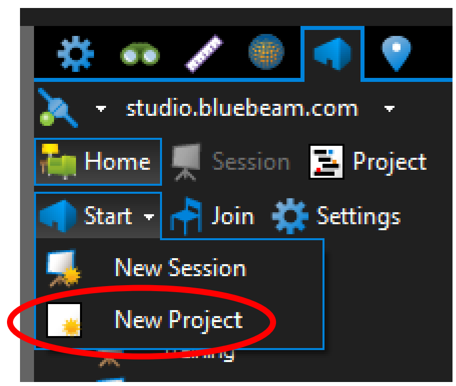
By the end of this lesson, learners will be able to:

- Create a new Studio Project.

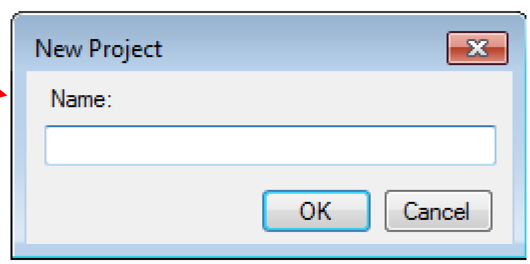
- Upload individual files of any file type to a Studio Project by right-clicking on the Project name.
- Create a new folder & then upload individual files of any file type to a Studio Project by right-clicking on the Project name.
- Upload an existing folder of files to a Studio Project by right-clicking on the Project name.
- Invite colleagues to join them in a Studio Project by typing in an email address.
- Invite attendees to a Studio Project using their email address book.
- Restrict attendees by email address.
- Before you can start a Studio Project you must create a Studio account. (See Module 10.2 Setting Up a New Session)

To start a new **Project**:

1. Go to **View** > **Tabs** > **Studio** or press ALT+C to open the Studio tab.
2. On the **Studio** tab, go to **Start** > **New Project**.

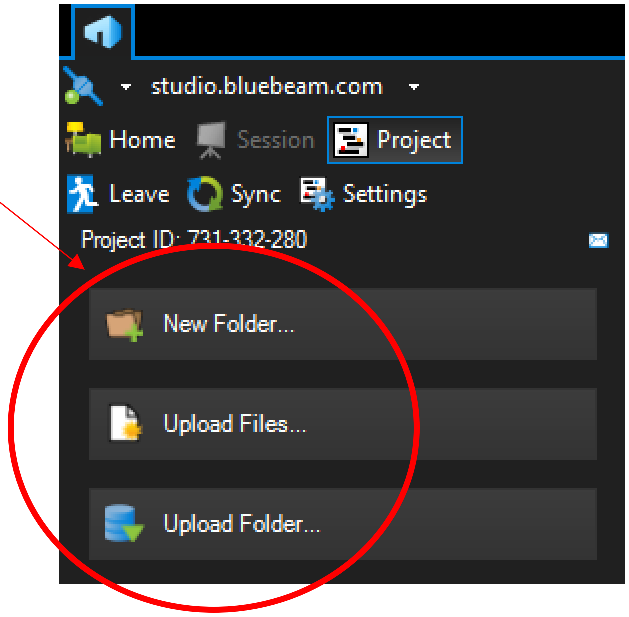


3. The **New Project** dialog box appears.

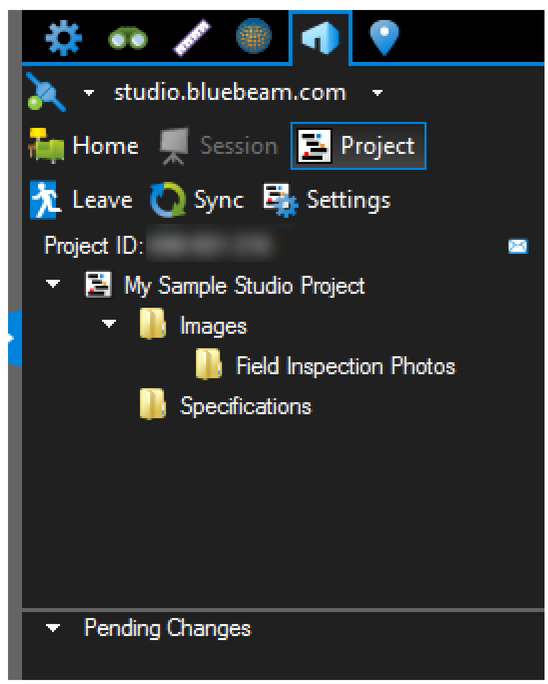


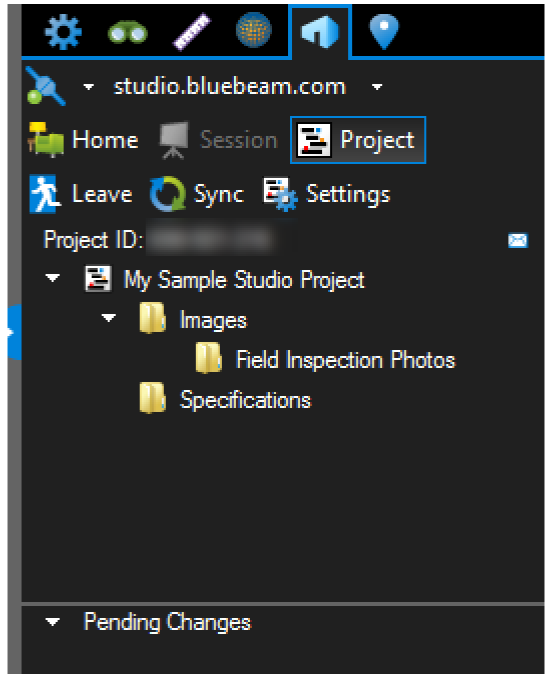
4. Enter a name for the Project & click **OK**. The Studio tab changes to show the empty Project.

To add initial Project **files**, select from the three options:



- **New Folder**: Creates a new folder in the root directory of the Project. Once selected, the **New Folder** dialog box appears. Enter a name for the folder & click **OK** to create it.
- **Upload Files**: Uploads individually selected files to the root directory of the Project. Once selected, the **Open** dialog box appears. Navigate to the desired files (CTRL-click or SHIFT-click to select multiple files, if desired) & click **Open**.
- **Upload Folder**: Uploads the contents of a folder to the root directory of the Project. Once selected, the **Select a folder to upload** dialog box appears. Navigate to & select the desired folder & click **Select Folder**.





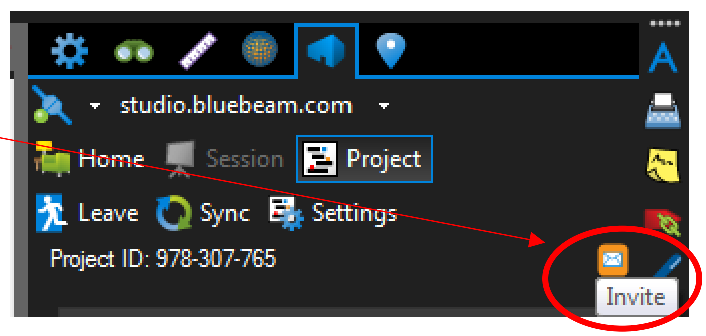
- This option recreates the selected folder in the Project & uploads the contents into that folder automatically.

- Additional files & folders can be added to the Project later as well.

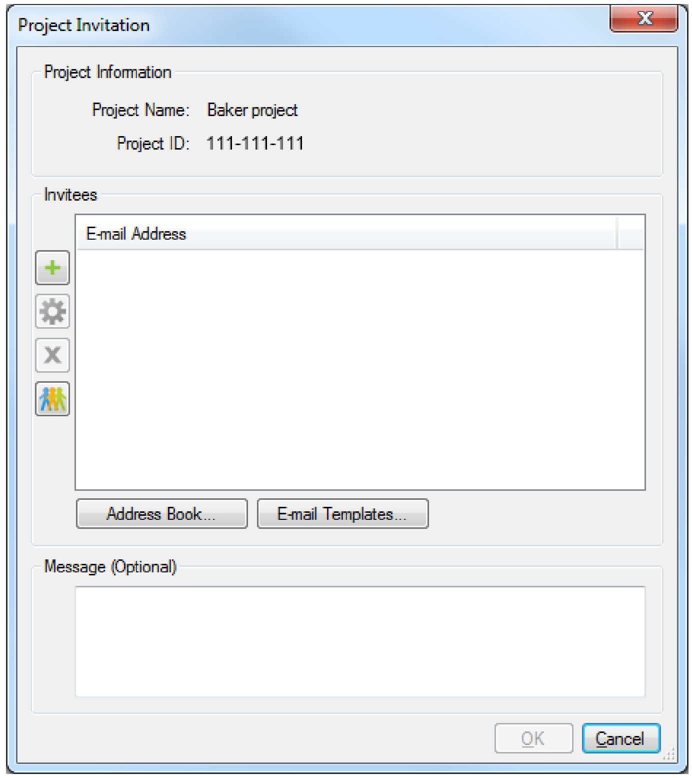
To invite a user to the Project:

Inviting somebody to a Project automatically adds them as an Allowed User in the Project Settings.In addition, the invitee is also sent an email containing information about the Project as well as a link allowing them to automatically connect to the Project.

1. When in the Project, click **Invite** on the **Studio** tab.



The **Project Invitation** dialog box appears.

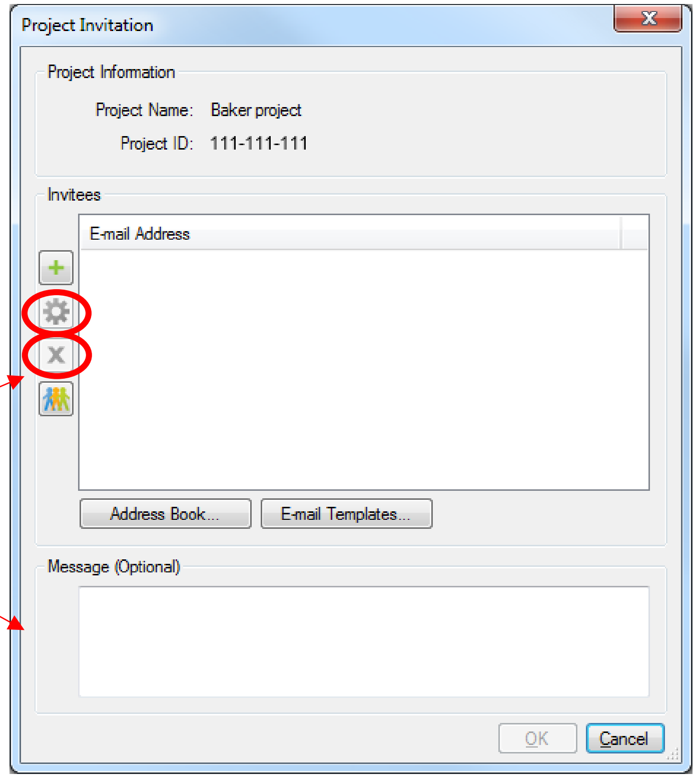


2. The **Project Information** is shown at the top of the dialog box. To copy this information to the clipboard in order to paste it into another program, such as an email message, IM or other document, click **Copy Invitation**.
3. To add invitees from the address book of your default email program, click **Address Book**.

Note: The email program must be MAPI compliant for Revu to access its address book. The address books from web-based email like Gmail, Hotmail or Yahoo cannot be accessed.

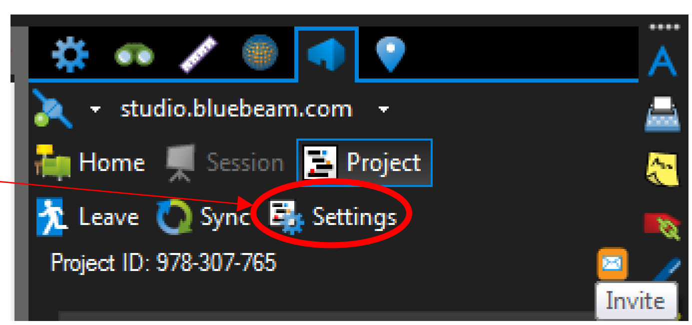
4. To add invitees manually, click +. When the **Add E-Mail Address** dialog box appears, enter the invitee's email address & click **OK**.

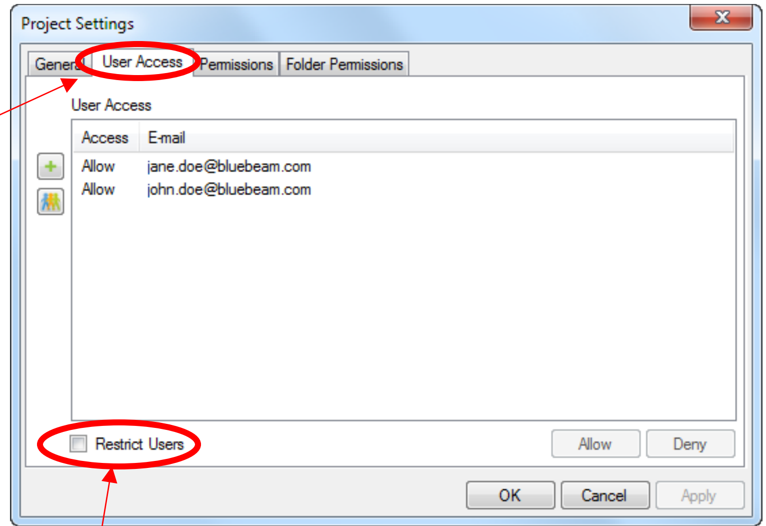
5. To add all the members of an existing Group, click . When the **Select Groups** dialog box appears, select the desired Group & click **OK**.
6. To change the email address of an invitee, select the entry & click . When the **Modify E-mail Address** dialog box appears, enter the new email address & click **OK**.
7. To remove an invitee, select the entry & click .
8. Enter a **Message** to add to the invitations, if desired.
9. Click **OK**. Email invitations will be sent to all the invitees from the Studio server.



To add users & restrict access:

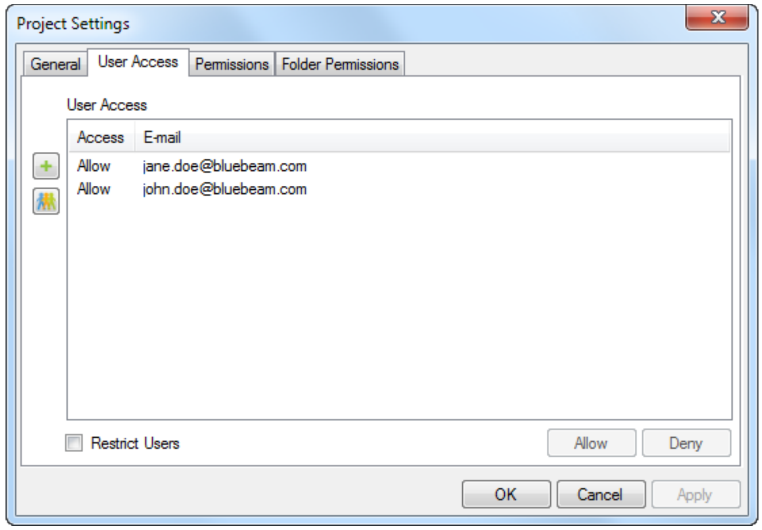
1. When in a Project, click **Settings** on the Studio tab.





The **Project Settings** dialog box appears.

2. Click the **User Access** tab. Previously invited users will appear in the list.
3. To add new, individual users, click ➕ . The **Add E-mail Address** dialog box opens. Enter the user's email address & click **OK**.
4. To add the users in a **Group**, click the group icon. The **Select Groups** dialog box opens. Select the desired group & click **OK**. All the users in that Group are automatically added.
5. By default, all users added to the **User Access** tab automatically have their **Access** set to **Allow**. To deny access to a specific user select the desired user & click **Deny**.
6. To restrict access to this Project to only those users listed on the **User Access** tab whose **Access** is set to **Allow**, select **Restrict Users**.



a. The relationship between this setting & a user's **Access** status (either **Allow** or **Deny**) lets you set up the equivalent of a "white list" or a "black list" & merits some further explanation:

b. When **Restrict Users** is checked, only users listed here on the **User Access** tab whose **Access** is set to **Allow** will be able to access this Project. This is the equivalent of a "white list."

c. When **Restrict Users** is not checked, any user can access the Project except for those listed here on the **User Access** tab whose **Access** is set to **Deny.** This is the equivalent of a "black list."

7. Click **OK**.

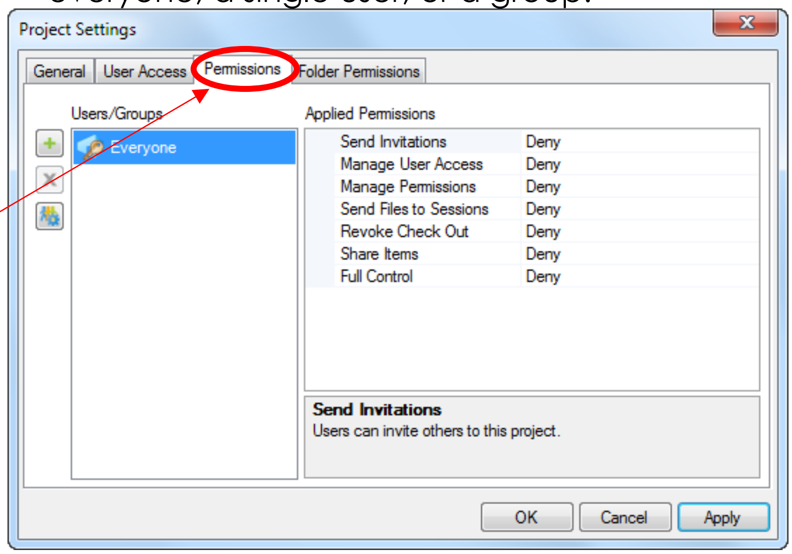
11.3 Setting Permissions

Lesson objectives

By the end of this lesson, learners will be able to:

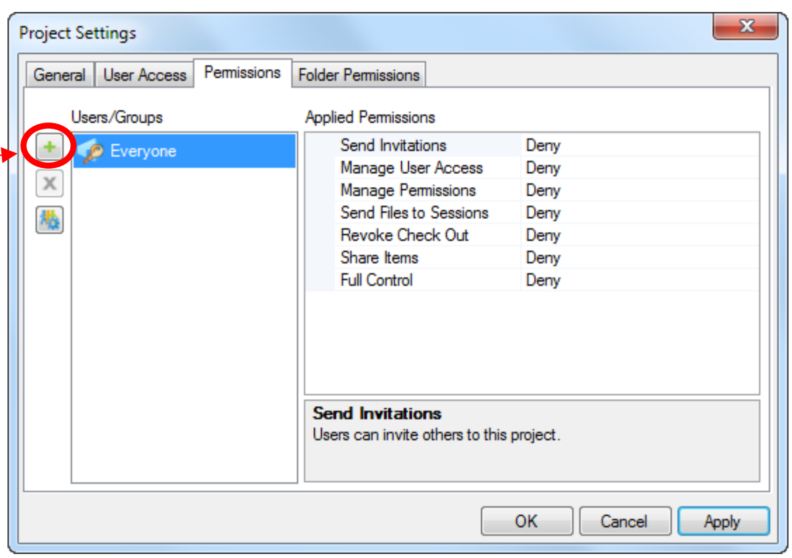
- Set admin-level permissions in a Studio Project for everyone, a single user, or a group.
- Set folder-level permissions in a Studio Project for everyone, a single user, or a group.

1. When in a Project, click **Settings** on the **Studio tab**. The **Project Settings** dialog box appears.
2. Click the **Permissions** tab.

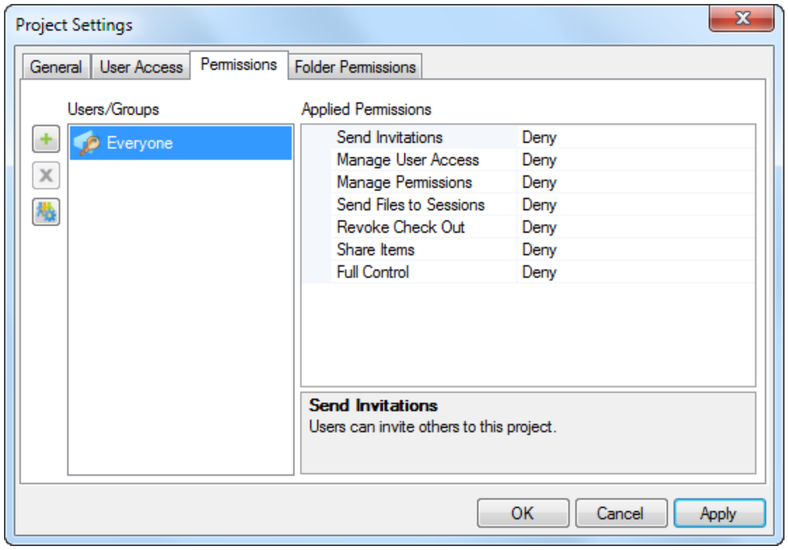


The default group, **Everyone**, will be shown, as well as any other Groups that have been previously added to this Project. The **Everyone** group applies to all users in the Project & its initial permission settings are configured when the Project is created. It cannot be deleted. Most permissions for the **Everyone** group are set to **Deny** when the Project is created; a recommended best practice is to give additional permissions to specific users & Groups rather than allow greater access to the **Everyone** group.

3. To add individual users or **Groups**:
   a. Click **+**. The **Add Users/Groups** dialog box opens.
   b. Select the desired user or group & click **OK**. By default, when users & Groups are added they inherit the permissions of the **Everyone** group.

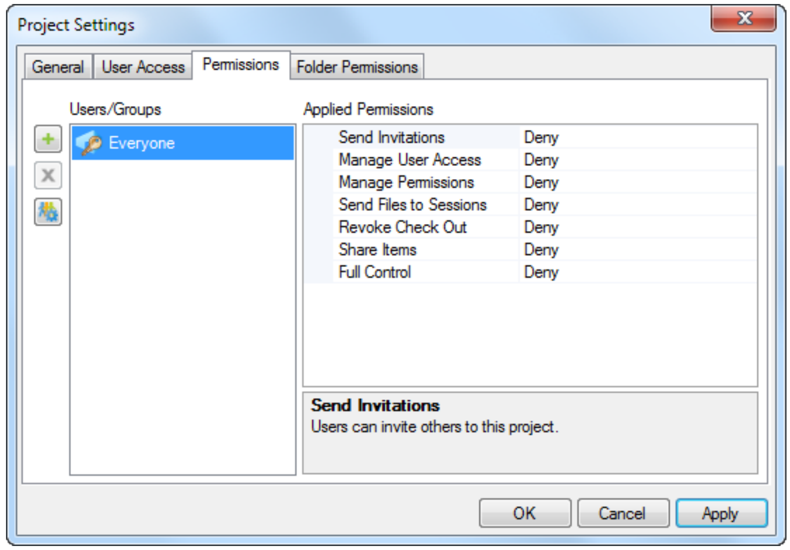


Note: Individual users will not appear in the list until after they have accessed the Project for the first time.



4. To change the permissions for a user or Group:
   a. Select the desired user or Group in the **Users/Groups** list.
   b. Select the desired permission in the **Applied Permissions** list. A dropdown list arrow will appear to the right of the selected permission.
   c. Select a permission setting from the dropdown list.
5. When defining permissions for the **Everyone** group, the options are **Deny** or **Allow**.
6. When defining permission for all other users & Groups, then options are *blank*, **Deny** or **Allow**. Selecting *blank* will cause the user or Group to inherit the permission defined for the **Everyone** group.

a. The **Full Control** permission is powerful & setting it to **Allow** gives the user or Group of users administrator powers. The effects of this are:
b. All permissions for administrators are set to **Allow**.
c. Administrators can rename the Project.
d. Administrators can delete the Project.
e. Administrators can manage [User Access](#).
f. Administrators can manage Permissions for other users.
g. Administrators have full permissions to any folder, regardless of the [folder's default permissions](#).



7. There are some limits on what administrators can do, however:
   a. Administrators cannot block the Host.

   b. Administrators do not have access to the Host's (or any other administrator's) Groups.
8. To remove a user or Group, select them & click ❌.
9. Click **OK**.

11.4 Working With Documents in Studio Projects

Lesson objectives	By the end of this lesson, learners will be able to: • Open a document in read-only mode. • Identify when a document is open in read-only mode. • Check out any document by right-clicking on the document in the main section of the Studio tab. • Check in any document by right-clicking on the document in the main section of the Studio tab. • Undo check out of a file by right-clicking on the document in the main section of the Studio tab. • Find out who checked out a document by hovering over the document name in the main section of the Studio tab.

Files not checked out by you

Right-click on a file in the Project file list & you have the following options depending on the file type, the current status of the file, & your permissions:

Open: Opens the file for viewing. Files that are only opened (but not checked out) cannot be edited.

Check Out: Opens the file (if it is not already) & checks it out to you. Only files that have been checked out can be edited & only one user can check out a file at a time.

Download Copy: Downloads a copy of the document to a local or network drive.

Rename: Changes the name of the file.

Cut: Cuts the file from its current location so you can move it to another folder in the Project.

Copy: Copies the file so you can paste another copy into another folder in

the Project.
Paste: Pastes a cut or copied file into the selected folder.
Delete: Removes the file from the project.
Add to New Session: An the PDF file to a new Studio Session. Only valid for PDF files.
Add to *session name*: Add the PDF file to this existing Studio Session. Only valid for PDF files.
Share Link: Allows you to provide a link to the Project file that can be used by somebody outside the Project to open & view the file.
Revision History: Shows the revision history of the file & allows you to open a previous version of the file.
Properties: Shows the properties of the file, including its name, project path, status, creation date, & size.

Files checked out by you

Open: Opens the file for viewing &/or editing.
Open Project Copy: Opens the server copy of the Project file in a new tab.
Download Copy: Downloads a copy of the document to a local or network drive.
Check In: Saves the file to the Project & makes it available for another user to check out.
Update Server Copy: Updates the Project file with changes you have made but does not check it in.
Undo Check Out: Releases your Check Out (making it available for another user to check out) & discards any changes you made to the file.
Replace File: Allows you to replace the server copy of a Project file with one from a local or network drive.
Revert Changes: Reverses any changes you have made to the Project file that you have not checked in, essentially opening the server copy again.
Copy: Copies the file so you can paste another copy into another folder in the Project
Share Link: Allows you to provide a link to the Project file that can be used by somebody outside the Project to open & view the file.
Revision History: Shows the revision history of the file & allows you to open a previous version of the file.
Properties: Shows the properties of the file, including its name, project path, status, creation date, & size.

11.5 Viewing Revision History

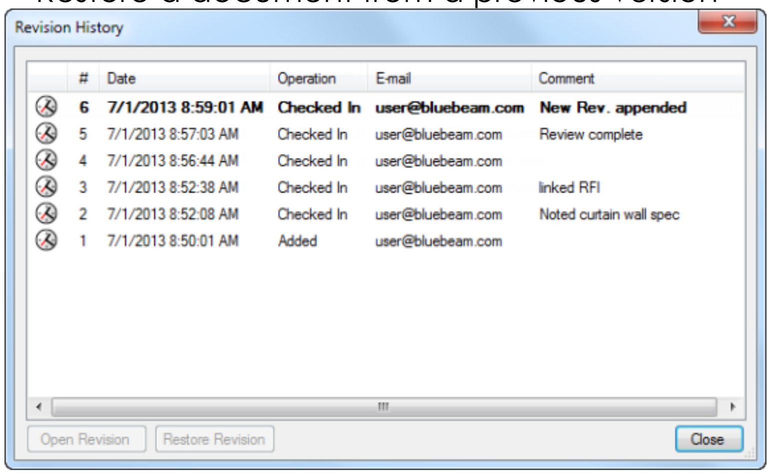
Lesson objectives

By the end of this lesson, learners will be able to:

- View the history of changes made to a document by right-clicking on the document in the main section of the Studio tab.
- Restore a document from a previous version

To view a document's previous versions:

Right-click the desired document in the Project list & select **Revision History**. The **Revision History** dialog box appears with all previous versions listed.

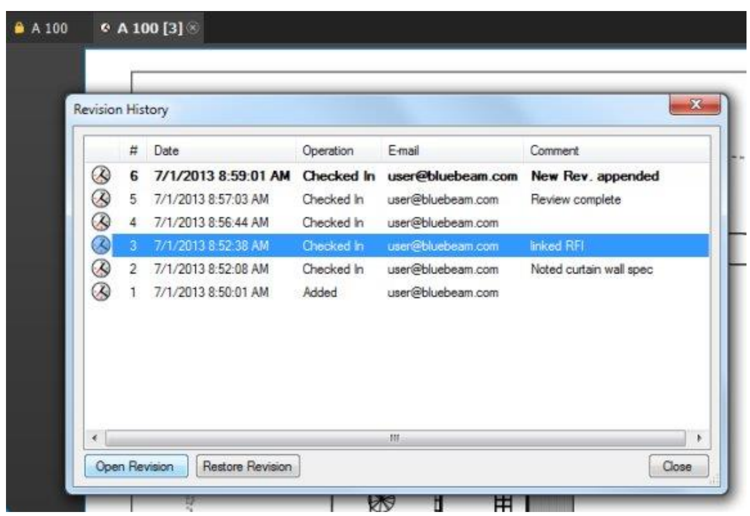


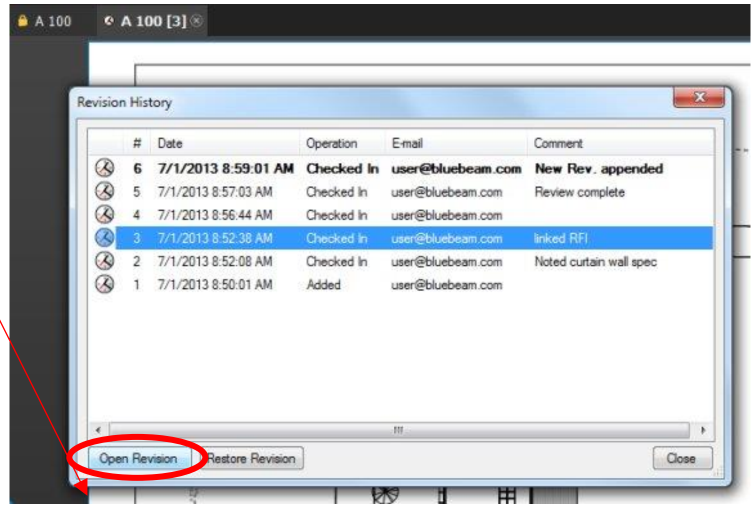
Each file listed in the **Revision History** dialog box is numbered, with Revision #1 being the file's initial upload. The latest revision, representing the current state of the document, will appear bolded at the top of the list.

Each revision, including the latest, can be opened & viewed in a read-only state.

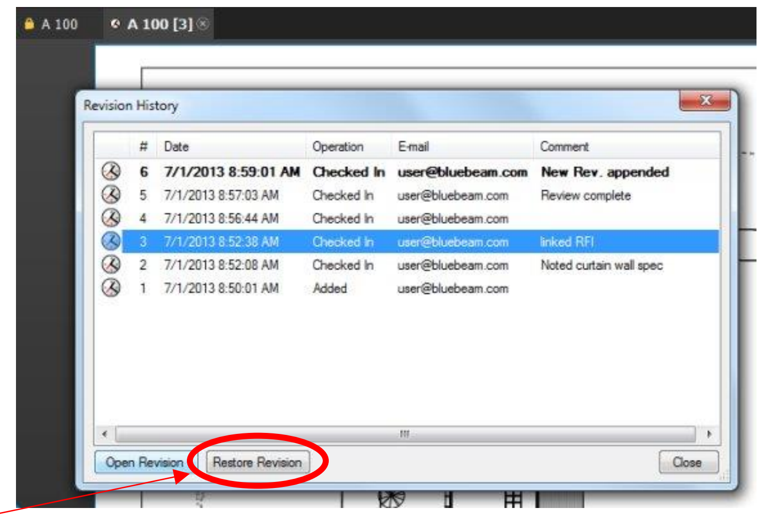
To open a previous version of a document:

1. **Right-click** the desired document in the Project list & select **Revision History**. The **Revision History** dialog box appears with all previous versions listed.





2. Select the desired version & click **Open Revision**. The revision will open in its native application with the revision number automatically appended to its file name.



To restore a document to a previous version:

1. **Right-click** the desired document in the Project list & select **Revision History**. The **Revision History** dialog box appears with all previous versions listed.
2. Select the desired version & click **Restore Revision**. A new revision of the document is created from the selected version & added to the **Revision History** with a note regarding its origin. None of the previous versions are overwritten or deleted.

For more information on **Studio Projects Click** on the link to the right.

Studio Projects Video Tutorial

Activity – Module 11 Review: "Pop Quiz!"

- **True or false? You can upload individual files to a Studio Project.**

  Answer: True.

- **True or false? You can upload an entire directory of files to a Studio Project.**

  Answer: True.

- **True or false? You can right-click a file in a third-party account like Dropbox, & then add the selected file to a Studio Project.**

  Answer: False.

- **How can you identify whether or not a document is checked out—& by whom?**

  Answer: The file name will display a red checkmark next to it; hovering your mouse cursor over the file name will display a tooltip with the email address of the person who has it checked out.

- **True or false? Once a Project file is checked back in, the old copy of the file is replaced entirely.**

- **Answer:** False.

12.0 Additional Resources

12.1 Module Overview

Lesson objectives	By the end of this lesson, learners will be able to: • Access the free training videos on Bluebeam's website. • Access the Ask Support articles on Bluebeam's website. • Identify where on Bluebeam.com to download premade tool sets & Profiles.
Free **training videos** on Bluebeam's website	Revu Features & Tools
Ask **Support** articles	Bluebeam Knowledge Base
Download Bluebeam's premade **Tool-sets**	Tool-Sets
Download Bluebeam's premade **Profiles**	Profiles
Free **training videos** on Lynda.com website	Sign into www.lynda.com & search for "Bluebeam Training & Tutorials"