

# **Bluebeam User Guide**

# **Managing Bluebeam**

Version 3.1



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# What is Bluebeam?

Bluebeam is a cloud-based external collaborative tool that allows both MassDOT and external consultants the ability to manage, comment and share updates to documents and drawings in real-time during the 25%, 75%, 100% and PS&E review phases. This process allows reviewers to follow the changes to the documents and drawings and expedites the review time, as it is all captured electronically. Bluebeam eliminates the need to generate response to comment forms in Word or Excel and distribute them to the PM.

The Bluebeam session can be easily accessed through an invitation link from the session creator, the Project Manager. Users also have the option to access a session using the session number.

Per Engineering Directive E-18-002, Bluebeam Revu is the platform that shall be used for all phases of projects in the project delivery program. The current version of Bluebeam is Bluebeam 2020. This guide, including tutorial information, shall be based on that version.

Depending on the nature of the review - design, construction, design-build - there are different ways that the digital review process is built into the project delivery schedule. This is illustrated in the following flow charts:







GING BLUEBEAM



Bluebeam Functional Area/Activities and Roles

Bluebeam Functional Area/Activities and Roles							
	Roles						
Functional Area/Activities	PM	Co-Host	Reviewer	Supervisory Review	Designer of Record		
Creates Session	Y	N	N	N	N		
Ability to Comment on Documents via Bluebeam invite	Y	Y	Y	Y	Y		
Ability to Add Additional Reviewers to the Session	Y	Y	N	N	N		
Ability to Open and Close Session	Y	Y	N	N	N		

# Business Roles and Definitions

**Project Manager** – Project Manager assigned in Project Info for a specific Project. Responsible for the management of Submittal Reviews utilizing Bluebeam.

**Co-Host** – Ability to add additional Reviewers to the session. Ability to act as PM in full capacity if PM is unavailable.

**MassDOT Reviewers** – MassDOT technical subject matter experts who have been identified by discipline.

**Designer of Record** – Selected Designer of Record (DOR), either in-house MassDOT designer, or a consultant hired for a specific project.

**Supervisor Review** – Reviewer's supervisor. When a Reviewer sets status to "Pending Supervisor Review", Supervisor will review sessions and recommend modifications or approval for the Reviewer to implement.

### General Guidance

#### What are studio sessions?

Sessions enable document-based online collaboration. They are accessible through the Revu interface. Only the host needs a Revu license to initiate a Studio Session, and all invited attendees can participate in the Session through Revu, Revu for iPad or even our free PDF viewer, Bluebeam Vu for Windows and iPad.

Each session is unique to a specific submission within a project. Project Info – Project Info entries and responsibilities are still mandated and required. All Project Info updates must include the session start date under "Package Distributed", and review time frame.

#### Changing Author Settings

Please follow the steps below to change your author settings within Bluebeam (will take effect in new BB sessions). Please use the [District or HQ Section] [First Name] [Last Name] format; Example: D1 John Smith, HQ Traffic Jane Smith.

This will help the PM and the Designer know who the review comment is coming from and will also help organize the CRM.

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• It is especially important to initiate your session by confirming you are connected. It is recommended never to work "Offline"



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- All "General Comments" should be posted on the first page of the document set.
- Consultant evaluation scores shall be provided by the reviewers. The Project Manager is responsible for including the data entry form from SOP 810 Attachment E for reviewers to fill in scores at each design stage (25%, 75%, 100%).
- Only the creator of the comment(s) has the ability to delete the comment or information.
- It is critical to only use objective language when writing a comment or replying to one.

# Setting-up Your User Interface

In Revu, tools and data are organized in panels that appear in specialized pull-outs found at the left, right, and bottom of the application. The two panels most frequently used are the Studio panel and the Markups panel.

Whether a particular panel is visible in the workspace or not is customizable. To show or hide panels, go to **Window** > **Panels** and select the desired panel: highlighted panels appear in the interface and the others are hidden.





#### Session Status

Setting this session status is an important step in Bluebeam. The purpose of setting status will be used by the PM and other users to identify participation in the session and notify when complete.

Each Reviewer is responsible for setting their respective Status.

- 1. Reviewing
- 2. Waiting
- 3. Finished

Once the session is opened, Reviewer is required to set the status to "Reviewing". Upon completion of the review and prior to the review due date timeline, the reviewer is required to set the status to "finished".

#### **Status Definitions**

- 1. **Reviewing:** Reviewer is currently reviewing documents during defined review timeline.
- 2. Waiting: Reviewer has reached out to other Reviewers and is waiting for feedback or waiting for supervisor approval.
- 3. Finished: Review is complete Review status "Finished".



# **Designer of Record Role**

#### General

The designer of record (consultant or in-house) is responsible for assembling and organizing documents for each of the scheduled phases. In addition, the designer is responsible for ensuring that all comments have been addressed, including documenting, and tracking comments that are not addressed through the comment resolution meeting.

#### **Design Submission**

All files to be reviewed shall be submitted to the MassDOT PM in .pdf format. All other file types shall be submitted as required by MassDOT.

Files to be reviewed shall be named with the following prefixes. The file name after the prefix can be determined by the Consultant. For example, 001\_XXXXXX\_Bridge B-01-001 Sketch Plans

#### Naming convention prefix:

- 000 Table of contents
- 001 Plan submittals
- 002 Utilities
- 003 ROW
- 004 Environmental
- 005 Reports
- 006 Specifications
- 007 Estimate
- 008 Schedules
- 009 Other

Provide a Table of Contents with the submission which describes all the files provided in the submission.

When plotting AutoCAD drawings to .pdf, prior to plotting, set EPDFSHX to 0 within AutoCAD.

All other PDF files shall be "flattened" prior to submitting. Certified PDF files will not be accepted.

Highway plan sets shall consist of a single volume and be submitted as a single PDF. Color utility plans shall be included within the highway plan set in lieu of black and white plans.

## Designer Response to Comments

After the review is complete the MassDOT PM will invite the designer (in-house or consultant) to the review session to respond to comments. While comments are being responded to, only the designer and the MassDOT PM will have access to the review session. Access to the session for the MassDOT reviewers will be denied once review comments are finalized.

The designer will respond to comments by setting a status to the comment within Bluebeam and providing a written response to the comment within Bluebeam. The available statuses are: Accepted, Rejected, Cancelled, Completed, and None.

1. To set the status of the comment, click on the comment in the comment log, and from the Status pull down at the top of the comment log, set the status of the comment.



2. To provide a written response to the comment, right-click on the comment, and then select Reply. Provide a written response in the text box.

#### Figure 2a Reply to Comment

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#### Figure 2b Reply to Comment

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3. When the comment has been responded to, the response will appear below the comment in the comment log.

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After all comments have been responded to, the designer will coordinate with MassDOT PM to set up a Comment Resolution Meeting (CRM). During the CRM, Bluebeam will be utilized to review comments/responses as needed. Note that comments may be sorted by Subject, Page Label, Comments, Author, Date, Status, etc. After comments/responses have been resolved, the Consultant will modify any responses as needed and then notify MassDOT PM when completed.

# **Project Manager Role**

Getting started

#### OVERVIEW OF BLUEBEAM FOR REVIEWERS

Per Engineering Directive E-18-002, Bluebeam Revu is the platform that shall be used for all phases of projects in the project delivery program.

The current version of Bluebeam is Bluebeam 2020. This guide, including tutorial information, shall be based on that version.

Training: Periodic introductory training is available. Section supervisors shall be responsible for ensuring that reviewers are adequately trained.

#### SUBMITTAL DOCUMENTS

 Per the Design Schedule, the Designer will submit Submittal Documents for review using the defined File Template

#### Naming convention prefix:

- 000 Table of Contents
- 001 Plan Submittals
- 002 Utilities
- 003 ROW
- 004 Environmental
- 005 Reports
- 006 Specifications
- 007 Estimate
- 008 Schedules
- 009 Other
- The Project Manager is responsible for including the data entry form from SOP 810 Attachment E for reviewers to fill in scores at each design stage (25%, 75%, 100%).
   "See Appendix A-D"
- Must be part of a single review session
- The PM is responsible for ensuring the Designer adheres to the directed file naming convention
- The PMs will fully utilize the Design Project Checklist in PDGG to align with the Submittal Review for the Project
- The PM will be responsible for ensuring the Distribution list follows the SOP
- The PM will be responsible for inviting their Co-Host (contact your supervisor for assigned Co-Host).

- The PM will be responsible for inviting <u>DOTBluebeamSupport@dot.state.ma.us</u> as Co-Host
- The PM will be responsible for managing and maintaining access for the internal MassDOT Reviewers and the External Consultant Reviewers via the "Allow/Deny Process"
- The PM will be responsible for setting the expiration date in Bluebeam
- Recommended language for the "Add Message"

[Project Number [TOWN/Municipality]- [DESCRIPTION FROM PINFO] Design Stage: XX% Submission Review Comments due: MM/DD/YY Advertising Date: MM/DD/YY Designer: XXXXXXX Co-Hosts: MASSDOT CO-HOST, DOTBluebeamsupport Link to submission: PROJECTINFO LINK

- The PM will be responsible for reviewing all responses and coordinating any conflicts
- The PM will be responsible for managing and facilitating Comment Resolution Meetings
- Recommended tools for online meeting/conference tools:
  - Conference room meeting with computer and smartboard
  - Virtual Meetings
- The PM ensures the designer has finalized RTCs following the Comment Resolution Meeting
- The PM will Finalize Sessions
- The PM will be responsible for updating ProjectInfo and updating the ProjectInfo File Repository with the reviewed PDF documents
- The PM records dates in Tasks and Events in ProjectInfo
- All review sessions shall end at 11pm
- Consider adding any reviewers who previously reviewed prior submissions

## Creating a Session

To begin creating your new session, select "New Session" [NOTE: DO NOT create a "New Project"].



 Name your session. Sessions must be named with the Project Number + Town/Municipality and Submission description; click "OK". Example: 606060\_Town/Municipality\_25% Review

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All files should be added prior to sending session invites. This will allow the PM to make sure files are acceptable (named correctly, flat, not certified).

2. The **"Session Invitation**" screen will pop-up. Project Manager will need to refer to the Reviewer Distribution Lists in the SOPs.



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1 participant 🟢
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### **Helpful hints:**

- You don't need to initiate another session to add reviewers.
- You don't need to initiate another session to add documents.
- Documents can always be added or removed.
- Reviewers can only be added, but not removed.

# Setting A Bluebeam Session Co-Host

A Co-host is a person assigned by the PM and will have the ability to Add or Deny invitees. In rare cases, and only at the direction of their manager would they take full control of the session, due to long term absence or critical issues.

Only the Bluebeam Support Co-Host will have the ability to allow or deny an additional invitee at the direction of the Manager.

- A. To edit attendees access, click the "Attendee Access" icon next to the "Attendees" row.
- B. Click on the "Attendees" tab to add your co-host
- C. Enter the Co-Host email address.
  - 1. Click on the plus button (III) to add co-host's email address
  - 2. Enter your invitee's email address
  - 3. Click **OK**.
  - 4. Repeat steps above to add <u>DOTBluebeamSupport@dot.state.ma.us</u>



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# Manage Attendee Access

Following the review period, the PM will manage attendee access to the studio session, by denying access to Reviewers and inviting the Design Engineers.



Session Settings	Select the Permissions tab	$\times$
General Attendees		
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Session ID:	929-401-531	
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Total Files:	1	
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Version:	Studio v2	
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Managing access at the Permissions tab:

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Users/Groups	Applied Permissions	
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	Print	Allow
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- Follow invitation instructions to invite Design Consultant.
- Design Consultant conducts their response to comments.

After attendees are locked out, add the Design Consultant using the same invitation method:

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General Attendees Permissions		
Users/Groups	Applied Permissions	
+ ← Attendees	Save As Print Markup Markup Alert Add Documents Full Control	Allow Allow Allow Allow Deny Deny
		Attendee access column shows allowance for the Design Consultant while MassDOT is locked out.

# Helpful hint:

• You don't need to initiate another session to add reviewers.

## Finishing and saving a Bluebeam Studio Session

Create the folder in Pinfo that the session will be saved to. Ensure the folder name reflects Submission + Date (25% 5-1-2019). Example: Within the design submission folder in ProjectInfo would be folders "00\_Original Submission", "01\_Review Comments", "02\_RTCs", "03\_Finals". All reviewed documents must be saved in ProjectInfo.

Best practice would be to save files four times thru the session lifecycle:

- 1. Originals received from designer.
- 2. Reviewers made their comments.
- 3. Designer responded to comments.
- 4. Designer updated responses after CRM.

Once the Bluebeam session is complete, you need to "Finish" the session. Begin by closing all the session documents then click the "Finish" button. Continue to follow the steps below to complete the process.



The "Finish Session" pop-up window will display.

Please ensure Generate Report is checked	Finish Session × Test- 929-401-531 Include Markups Name Email Castron Nady K Castro@dot.state.ma.us	
	Save Options  Save (Overwrite Existing)  Save (Overwrite Existing)  Save (Overwrite Existing)  Save In Folder  C:Users\Castron\Documents  Session Subfolder  Do not save files  Close files after finishing  Report Options  Generate Report  C:Users\Castron\Documents\Test-929-401-53  Settings_	Select the Save In Folder" path by clicking on ellipsis button.
	Click <b>OK;</b> the session v be saved in folder sele (Bluebeam session is n over)	ected.

It is imperative you close the session when complete. Leaving your session open will cause the following:

- After 80 days, a notification email is sent to the Host saying the Session will be archived.
- After 90 days, the Session will be archived.
- After 170 days, the Host will receive another email stating that the Session will be deleted.

# CRITICAL INFORMATION: AFTER 180 DAYS, THE SESSION WILL BE DELETED PERMANENTLY. IT CANNOT BE RECOVERED!!! ALL FILES MUST BE SAVED TO PINFO

## **Creating Comment Resolution Document**

- 1. Open your session
- 2. Open your file(s) with review comments/responses within the session
- 3. Click Batch→Summary



- 4. Click the Add pulldown button and click Add Open Files
- 5. Click Next
- Uncheck all and recheck and reorder with the following columns File Name -> Author ->Page Label -> Status -> Comments
7. Sort the information that appears on the report, choose one or more sort options, starting with **Sort by**. All remaining options will be labeled **Then by**.

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	Lock	A	Built-In
	Checkmark		Built-In
	Creation Date	3/1/2022	Built-In
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- 8. Sort by Author (Ascending), then by File Name (Ascending), then by Page Index (Ascending)
- 9. Select **PDF** as the desired format for the summary report from the **Export as** menu
- 10. Select Open File After Creation
- 11. Confirm that the location in the **Export to** field is acceptable. To change it, click **Change** and select the desired location. It is recommended that you save the file directly to the appropriate folder in ProjectInfo.

Name		] 9	Pages					
Markup Su	rrimary.pdf	1	ul Pages (1 - 2)	1				
BLANK FIN	IALS FORMS JANUARY 2022.pdf	Ē	ul Pages (1 - 1)	-				
CSD-100 R	evised January 25 2022.pdf	Ē	VI Pages (1 - 1)	-				
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	Columns Filter and Sort	Output						
Export as:	POF							
	Append and Hyperlink to Current PDF							
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	Create Multiple Reports Per Subject Append Date to Title							
Template:	None	• ×	ம்					
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Style:	Table		-					
Thumbnall:	Large							
	V Include Page Content							
% Padding:	÷ 25							
	Options							
🕗 Open Fi	le After Creation	Save	Config Load	Confi				

1. Change the **Title** to **Project Number, Municipality, Response to Comments**. The name of the summary file will be based on this information.



- 2. Confirm under PDF Options that the style is **Table**, and the Thumbnail is **Large**.
- Before moving on, you can save the entire configuration and set of options to use on future projects or future submissions of the same project. To do so, simply click Save Config and save to the same location as your Export To field.
- 4. Click **OK**. The report is generated. This may take some time.
- 5. Save a copy of the report to the Bluebeam session. If you did not export to ProjectInfo in Step 10, save a copy of the report to ProjectInfo in the appropriate folder format and naming convention.

# Example Output:

Markup	File Name	Author	Page Label	Status	Comments
	607342_DJW_Rou te 28 at Chickatawbut Rd_05_07_2021.p df (7)				
	607342_DJW_Rou te 28 at Chickatawbut Rd_06_07_2021.p df	D6 Projects - Brian Levine	2	Accepted set by jlizza on 10/4/2021 at 5:25:39 PM	This DJW will be approved by District 6. We will start drafting up an official approval letter now and forward when available for sign off from the appropriate parties. Please note that the DJW will still need separate approval by the MassDOT Complete Streets section
-	607342_DJW_Rou te 28 at Chickatawbut Rd_05_07_2021.p df	D6 Traffic/Transit - Amitai Lipton	2	Accepted set by jitzza on 10/4/2021 at 5:27:51 PM	D6 Transit Coordinator: No exceptions taken to approving the DJW. Request that the two minor comments be addressed for the final DJW.
	607342_DJW_Rou te 28 at Chickatawbut Rd_06_07_2021.p df	D6 Traffic/Transit - Amitai Lipton	T:	Accepted set by jlizza on 10/4/2021 at 5:25:50 PM	
+	607342_DJW_Rou te 28 at Chickatawbut Rd_05_07_2021.p df	jizza	7		Wording will be changed to project area.
	607342_DJW_Rou te 28 at Chickatawbut Rd_05_07_2021.p df	D6 Traffic/Transit - Amitai Lipton	7	Accepted set by jizza on 10/4/2021 at 5:25:50 PM	Is this accurate? Confirm whether existing NB stop is near side or far side.
*	607342_DJW_Rou te 28 at Chickatawbut Rd_05_07_2021.p df	<i>BIZEN</i>	7		NB bus stop is far side, this text will be revised,

#### 607342 25% Rev1 RTCs Markup Summary

To link Markup Thumbnails with the actual comments, follow the steps below:

- 1. Save each PDF individually
- 2. Make sure "absolute hyperlinks" checkbox in the Options is checked.

# **Overview of Bluebeam for Reviewers**

Per Engineering Directive E-18-002, Bluebeam Revu is the platform that shall be used for all phases of projects in the project delivery program.

The current version of Bluebeam is Bluebeam 2020. This guide, including tutorial information, shall be based on that version.

**Training**: Periodic introductory training is available. Section supervisors shall be responsible for ensuring that reviewers are adequately trained.

#### Procuring access to Bluebeam

- 1. Users must request **Bluebeam Revu** via MassDOT Help Desk Ticket e-mail: <u>MassDOT/MBTA - Login - MyMassDOT (service-now.com)</u>
- 2. User must create a Bluebeam account



Please use the [District or HQ Section] [First Name] [Last Name] format; Example: D1 John Smith, HQ Traffic Jane Smith

tudio US; studio bluebeam.com	×	Studio US: studio bluebeam.com	Х
BLUEBEAM		Jame	
and the second second second		Last Name	
	uebeam account	Smith	
What's my Bluebeam ID? It Drawings and the Gateway.	's the email used to sign in to Studio, (?)	Bluebeam Display Name ( <u>?)</u>	
SIGN IN	CREATE ACCOUNT	e.g. jumih	h
First Name		Email (This will be your Bluebeam ID)	
	1	e.g. jane.smithl@company.com	
Jane		Password	
	ease make sure to use	Image: Second	
	our MassDOT email	Password must be 8-32 characters and include a lowercase	
Bluebeam Display	at includes the dot	letter, an uppercase letter, a number and a special character.	
e.g. jsmith	tension.	Confirm Password	
Email (This will be your Blu	inductions (TTN)	Click Create Account	
e.g. jane smith@compan	-y-com	Create Account	
Password			

## Managing your Account

Please beware, the e-mail address you provide for the Bluebeam account must be a MassDOT email address. E-mail address must include "**@dot.state.ma.us**" in order for your account to work properly. At this time, please create your username.

#### **Review Session Setup**

Reviewer will receive e-mail invitation (invite) to join the review process. To open the session and join the review process, simply click on the Session ID No. and you will be directed to the Bluebeam session.



# Join Session to Start Collaborating

nation in the invited you to collaborate on a Session in Bluebeam Studio.

Session Name: MassPORT Parcel H Lincoln Property Session ID: 341–147-659 Server: studio bluebeam.com

To join the review session, click on the Session ID No.

Their message: All, A Bluebeam Studio review session for the MassPORT Parcel H Lincoln Properties project has been initiated. Please conduct a review of the 100% submittal. The peer reviewer for the DOT is Stantec. Commenta are due at the end of next month on Friday, April 1, 2022. No additional comments will be accepted after this date and no comments will be accepted outside of Bluebeam. District Permits, please provide a SHAPS distribution list and verify that I have captured all of the submittals previously uploaded in SHAPS. Email the names of additional review staff you would like to have access to this session. Thank you Anthony Christakie

Or click Join Session

Firewalls and web security may ask for confirmation when trying to open the Bluebeam session. MassDOT reviewers may have to confirm the prompts shown below. Please click "Allow" on both prompts to open the session.

Internet E	xplorer
PDF	Do you want to allow this website to open a program on your computer?
	From: studio.bluebeam.com
	Program: Bluebeam Revu
	Address: bluebeam://join/113-081-011
	✓ Always ask before opening this type of address
	Click Allow Cancel
2	Allowing web content to open a program can be useful, but it can potentially harm your computer. Do not allow it unless you trust the source of the content. <u>What's the risk?</u>
-	
Internet E	xplorer Security
۲	A website wants to open web content using this program on your computer
	This program will open outside of Protected mode. Internet Explorer's <u>Protected mode</u> helps protect your computer. If you do not trust this website, do not open this program.
	Name:     Bluebeam Revu       Publisher:     Bluebeam, Inc.
	Do not show me the warning for this program again
	Allow Don't allow
	Click Allow

In some cases, users may have to copy and paste the Bluebeam Session ID included in the invite.

## Managing Email Notifications Preferences

1. Click the "Session Settings" button



2. Under Session Settings, General tab, click on the Manage Notifications link.

Session Settings				×
General Attendees	Permissions			
Session Name:	Test2			
Session ID:	898-617-633			
Total Users:	1			
Total Files:	2			
Total Space:	47.62 KB			
Created On:	3/1/2022 9:41:56 AM			
Version:	Studio v2			
Expiration:	Enabled	Mar 02, 2022	5:00 PM	
	Manage Notifications ck the Manage tifications hyperlink	<u>O</u> K	<u>Cancel</u>	/

3. The Studio Notifications Preferences form will display as shown below. Select your account preferences



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Bit Tests - 2004-07-403 []+ [1]      El     Wy Sama Persong     -    -	Test2 - 898-617-633	
Manage Account Preferences	Account Preferences	
Control Methods. Preday     Touring Methods and American American	Send me a daily digest of all Session and Project activity     Send me in email with Markup Alerta for all Sessions     Send me an email when an active Session is updated     Send me an email when an active Project is updated	
Control Janual Innum     Control Janual Control Innum     Control Innum     Control Innum     Control Innum     Control Innum     Control Innum     Control Januar     Control Januar     Control     Secure     Control     Secure	Anny	Dam CelmAn
* 0 Castron: Left Sealer * 0 Castron: June * Markept List Q. Search		

- 4. Click "Apply"
- 5. Click the <u>+Manage other Projects and Sessions</u> link for more

If you'd like to receive/stop receiving notifications for other Projects or Sessions you've previously logged into, make all appropriate selections under the Sessions and Projects Subscriptions.



6. Click "Apply" to save your changes.

Alternatively, users can create rules in MS Outlook to manage emails from Bluebeam.

**Please note:** Users will still receive emails for "Session Invite" and "Session Ended". If the Host makes any changes to the date/time field of the session expiration, users will also be notified through email regardless of any preferences changes.

## MassDOT Recommended Markup Tools

The MassDOT markup tools typically used are the following:

- Text Box
- Callout
- Cloud+
- Measure Tool

Note: When marking up submittal documents, reviewers should take care that markings and comments are clear and concise and do not obscure document content or other comments.

Markup menu



Use of tools other than those listed above, are not recommended because they don't translate well in the markup summary.

#### **Common Text Menu commands:**



Callout note: If you add a "callout", after you create it, you can right-click and add "leaders" rather than arrows and lines.





Cloud+ note: You cannot add more than one leader using Cloud+

## Other Useful Bluebeam Tools

#### Grouping Shapes and Textbox

To create your own box and add a callout comment, utilize the line and text commands in the Markup toolbar. Once completed, select every line and text box and right click on top of the selected shapes, then select "Group"



Note: After grouping objects, add a description of the group. Do this by right clicking on the group comment in the markups list and type a comment in the description.

# Adding Images and Documents

To add images to the document in review, select the "Tools" menu and click the Markup, then Image, and select from the list of options.





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Note: After attaching a document, add a description of the attachment. Do this by right clicking the paper clip or adding the description in the comment field.

# Sorting by Name

To sort comments by Author, click the Author title column





# Applying Filters

To apply filters to all columns, click the Filter button. Filter arrows will become enabled on each applicable column as shown below.

	Q. Search	×	V Filter	List		Flite	r List to	r all col	umn		
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# Comparing documents in a Bluebeam Session

When reviewing documents, comparing two versions of the same document in the Bluebeam session is possible by opening both documents and splitting the window in two. Documents in the Bluebeam session have the blue studio symbol (icon) on the left of the document name tab.

To split the window and view both documents at the same time select the Window menu and click on "Split Vertical".

	Fit Page Click View	Tools Window Help
Session: Test2 ID:	Fit Width	JANUARY 2022.pdf Pages: 1
🗄 Studio 🗸 🔝 📮 🔯	Actual Size Ctrl+8	RY 2022_Diff(1)*
Image: Second state st	Single Page     Ctrl+4       Continuous Pages     Ctrl+5       Side-by-Side     Ctrl+6       Continuous Side-by-Side     Ctrl+7       Show Cover Page in Side-by-Side     Bataste View       Botaste View     Ctrl+1       Split Vertigal     Ctrl+4       Split Horizontal     Ctrl+1	
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<sup>41</sup> <sup>(2)</sup> Castron: Left S ✓ <sup>42</sup> <sup>(2)</sup> Castron: Joine Ø Session	Always Show Reply Indicators Disable Line Weights	DATE JOR COMPLETED:
<ul> <li>41 Q Castron: Set status blank</li> <li>44 Q Castron: Left Sessi 45 Q Castron: Joined Session</li> <li>45 Q Castron: Add File Attachment</li> <li>47 Q Castron: Move File</li> </ul>	on 2	Any question concerning this form Mixed context The Complete Confidence of Bioster MAX, G2116-7764 Page (617) 979-0035 Completion Completion Completion

Note: Reviewers can see the same place on both documents simultaneously using the Synchronize Document tool.

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Herz - 499-477-633 - [])+ 167 My threas [] /2 - Athendres [] /2 Athendres [] Hilbe (1) 1 Danser (BLANK FindLS I	TAVETNENT MANAGEMENT TAVETNENT MANAGEMENT TAVETNENT BISHARELTATION PROJECT BEPORT	
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The split screen will display both documents as shown below.

#### Measure Tools

The Measure tool creates measurements in any of several measurement modes. Measurements can persist as markups, allowing for processing and summarization through the Markups list, which is useful for estimation and takeoffs, or be temporary, which is useful for quickly measuring and adding up measurements without creating a visual record on the PDF.

When the Measure Tool is activated, the last measurement mode used is automatically selected. This makes it easier to employ your most commonly used measurement mode.

To enable accurate measurements, the user must first calibrate the page/drawing; then, proceed to use any of the measurement and calibrate tools available.



# Calibrate

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## Review Closure and Responses

Review period will end at 11PM on the date indicated. At that point, the Project Manager will close access to reviewers, and open access to designers. Designers typically have 10 days to respond.

Designer completes response to comments, Project Manager will notify all reviewing sections. Comments will be output to PDF, organized by reviewing unit, with dynamic links to reference documents.

Project Manager will schedule a Comment Resolution Meeting to resolve any questions.

#### Comment Resolution

Designer shall be responsible for ensuring comments are either addressed or that recommendations for next steps on unresolved issues be noted in follow-up memo.

#### Appendix A: Bluebeam Manual Consultant Evaluation Form Guidance

#### Guidance for MassDOT Project Managers:

- Consultant Evaluation Forms shall be uploaded into the Bluebeam Session by the MassDOT Project Manager at the 25%, 75% and 100% design stages, including any resubmissions. This form will become part of the design submission package. Design consultant performance evaluations are required per Engineering Directive E-10-005.
- The 25%, 75% and 100% Consultant Evaluation Forms can be found in Section 810 Contract Award Process, Attachment E in the Project Management SOPs.
- Once located in the SOP, please save a copy of the Consultant Evaluation Form to a pdf using the following file naming structure: [009]-[Project File #]-[XX% Consultant Evaluation Form].
  - a) File naming example: "009-612190-100% Consultant Evaluation Form".
- After uploading the form into the Bluebeam session, the Project Manager is required to edit the applicable fields in red; see image below. The PM shall enter the Project file number and the Project description. The Bluebeam "Text Box" markup tool shall be used to input this information.

Consultant Evaluation Form					
Project File # : Field to be edited by MassDOT PM					
Municipality, Project Description : Field to be edited by MassDOT PM - Copy and paste from Project Info					

- The PM is responsible for making sure that all applicable review sections have included a score by the review session due date. If a score is missing the PM is responsible for contacting the reviewer(s) for compliance.
- The PM will enter "NA" in place of a score when review sections are not required to provide a score for a particular submission. For example, a Highway Project may not require a score from the HQ-Bridge Section.
- When the Bluebeam session ends, the MassDOT PM will save the Consultant Evaluation Form in the applicable folder in ProjectInfo with the entire design submission package.

#### Guidance for MassDOT Reviewers:

- At the 25%, 75% and 100% design stages, all applicable reviewers shall provide a score on the Consultant Evaluation Form, which will be located within the Bluebeam Session. Design consultant performance evaluations are required per Engineering Directive E-10-005.
- When in the Bluebeam session, the reviewer can refer to the Consultant Evaluation Form for guidance on scoring a design submission. To locate the form within the review session, please note *example* of the file naming structure, "009-612190-75% Consultant Evaluation Form".
- The Bluebeam "Text Box" markup tool shall be used to input a score. Each review section will include their score in the applicable colored cell of the form; see image below.

75% Design Submission						
Reviewers	Design Plans*	MEPA/NEPA	Wetlands/ Water	Hazardous Materials	Special Provisions	Estimate/ Calculations
District-Projects/DUCE						
District-Traffic						
HQ-Bridge						
HQ-Traffic						
HQ-Environmental						
ROW						
ADA/AAB						
Landscape						

- Review sections that are not required to provide a score for a particular submission will enter "NA" in the required field. For example, a Safe Routes to School Project may not require a review by the Landscape Section.
- The Consultant Evaluation Form will be stored with the design submission package and can be located in ProjectInfo for future reference.

#### Appendix B: 25% Stage Consultant Evaluation Form



#### 25% Stage Consultant Evaluation Form to be completed by applicable Reviewers - Please edit fields in Yellow.

#### Factors to consider when scoring:

- 1. Completeness of Submission (Please reference 25% Highway Design Submission & Review Checklist as well as the Bridge Checklist for additional guidance.)
- 2. Followed Division guidelines for plan preparation and survey control clarity, accuracy, and completeness of plans.
- 3. Responsiveness and cooperation.
- 4. If your section is not required to provide a score for this submission then please enter "NA" in the applicable field.

#### **Consultant Evaluation Form**

#### Project File # :

Municipality, Project Description :

25% Design Submission					
Reviewers	Design Plans	DJW	Environmental Documents		
District - Projects/DUCE					
District - Traffic					
HQ - Bridge					
HQ - Traffic					
HQ - Environmental			E		
ROW			-		
HQ - Complete Streets					

#### Appendix C: 75% Stage Consultant Evaluation Form



#### Factors to consider when scoring:

- 1. Completeness of Submission -(Please reference 75% Highway Design Submission & Review Checklist as well as the Bridge Checklist for additional guidance.)
- 2. Adequately addressed previous submission comments.
- Followed Division guidelines for plan preparation and survey control clarity, accuracy, and completeness of plans.
- 4. Included required special provisions.
- 5. Limiting cost increase due to design errors & quality of estimate.
- 6. Responsiveness and cooperation.
- If your section is not required to provide a score for this submission then please enter "NA" in the applicable field.

#### **Consultant Evaluation Form**

#### Project File # :

Municipality, Project Description :

75% Design Submission						
Reviewers	Design Plans*	MEPA/NEPA	Wetlands/ Water	Hazardous Materials	Special Provisions	Estimate/ Calculations
District-Projects/DUCE				-		
District-Traffic						
HQ-Bridge						
HQ-Traffic		l i i i i i i i i i i i i i i i i i i i				
HQ-Environmental						
ROW						
ADA/AAB						
Landscape						

\* District Projects/DUCE score based on entire submission.

\* District Traffic score based on entire submission.

\* Landscape score based on entire submission.

#### Appendix D: 100% Stage Consultant Evaluation Form



#### 100% Stage Consultant Evaluation Form to be complete by applicable Reviewers - Please edit fields in Blue

#### Factors to consider when scoring:

- 1. Completeness of Submission (Please reference 75% Highway Design Submission & Review Checklist as well as the Bridge Checklist for additional guidance.)
- 2. Adequately addressed previous submission comments.
- 3. Followed Division guidelines for plan preparation and survey control clarity, accuracy, and completeness of plans.
- 4. Included required special provisions.
- 5. Limiting cost increase due to design errors & quality of estimate.
- 6. Responsiveness and cooperation.
- 7. If your section is not required to provide a score for this submission then please enter "NA" in the applicable field.

#### **Consultant Evaluation Form**

#### Project File # :

Municipality, Project Description :

100% Design Submission						
Reviewers	Design Plans*	Special Provisions	Estimate/Calculations			
District-Projects/DUCE						
District-Traffic						
HQ-Bridge						
HQ-Traffic						
ROW						
ADA/AAB						
Landscape						

\* District Projects/DUCE score based on entire submission.

\* District Traffic score based on entire submission.

\* Landscape score based on entire submission.

# Change Log

- Version 3.0 Official Release, October 2022
- Version 3.1 Revised Appendix, November 15, 2022