Bluebeam Revu 2016: Studio Invitation Process Guide

(YOGI v1.0)

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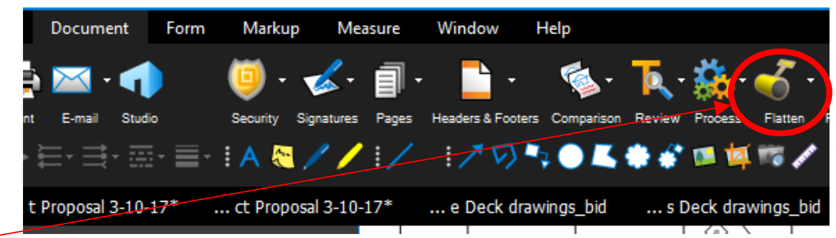
1.0 Format Drawings Prior to Studio Session

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

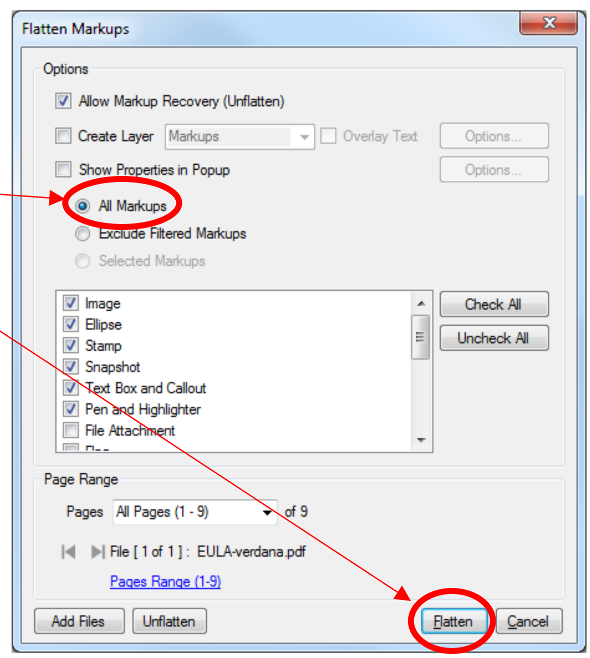
- Flatten Documents.
- Compress File Sizes.

1.1 Flatten Documents

- Open the documents you wish to flatten in Bluebeam. (**Not within a Session**)
- On the Command Bar, Click Document & **Flatten Markups**.

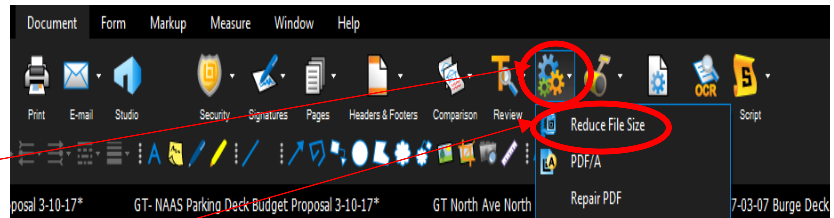


- In the Flatten Markups dialog, click **All Markups**, then click **Flatten**.

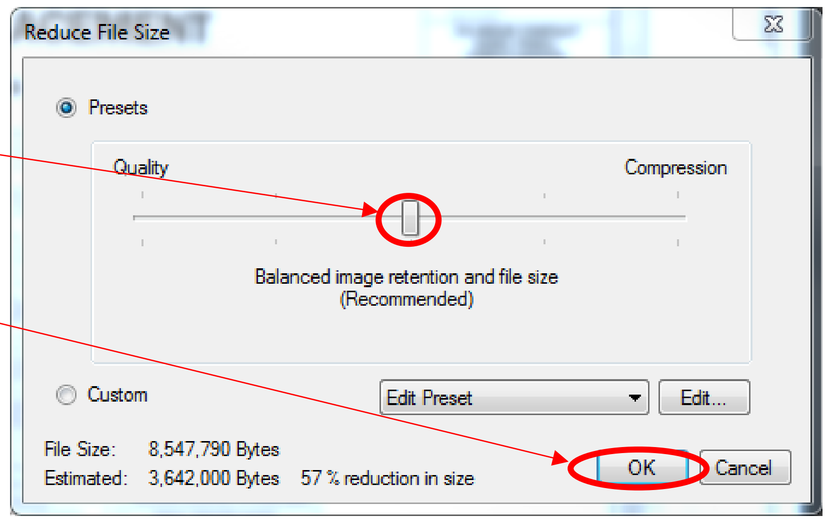


1.2 Compressing Documents

- Open the documents you wish to flatten in Bluebeam. (**Not within a Session**)
- From the **Document** tab, click on the **Process** dropdown menu, then **Reduce File Size** .



- In the **Reduce File Size** dialog, keep the preset reduction at 50% to maintain quality, but still reduce the file size low enough. Click **OK**.
- Save the file in the desired location & your ready to import into a Studio Session.



2.0 Studio Sessions

2.1 Setting Up a New Session

Lesson objectives

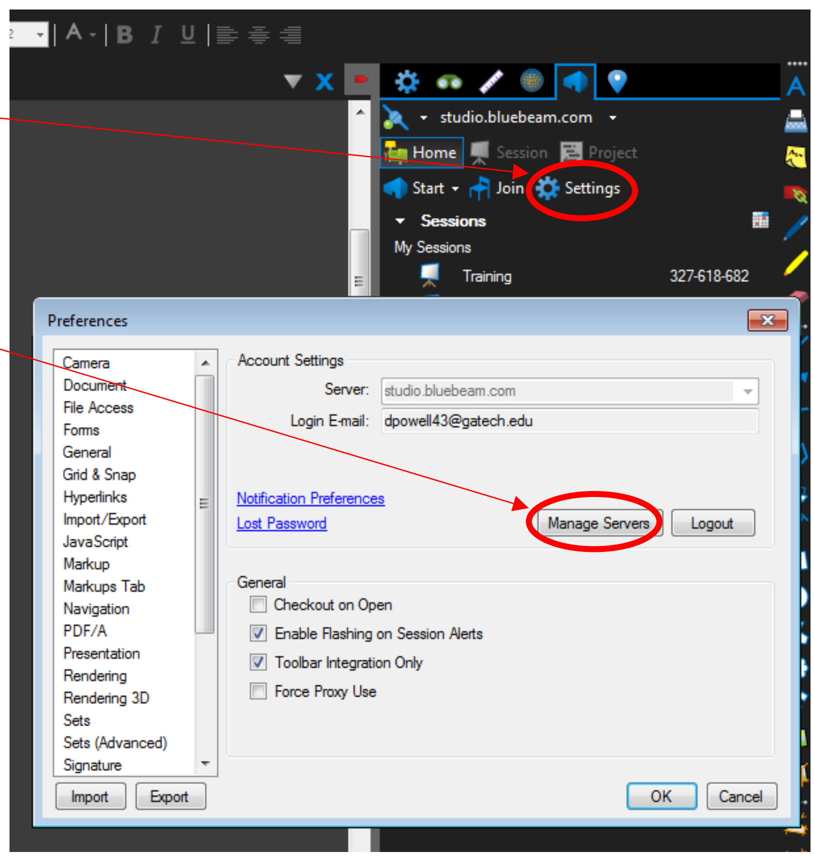
By the end of this lesson, learners will be able to:

- Set up a new Studio Session.
- Upload PDFs to a Studio Session during creation.
- Turn the default permissions on & off
- Unrestrict attendees by email during the creation of a new Studio Session.
- Invite colleagues to join them in a Studio Session by copying the invitation & emailing from GT email program
- Describe how they can invite attendees to a Studio Session using their email address book.

- **Create Studio Account**

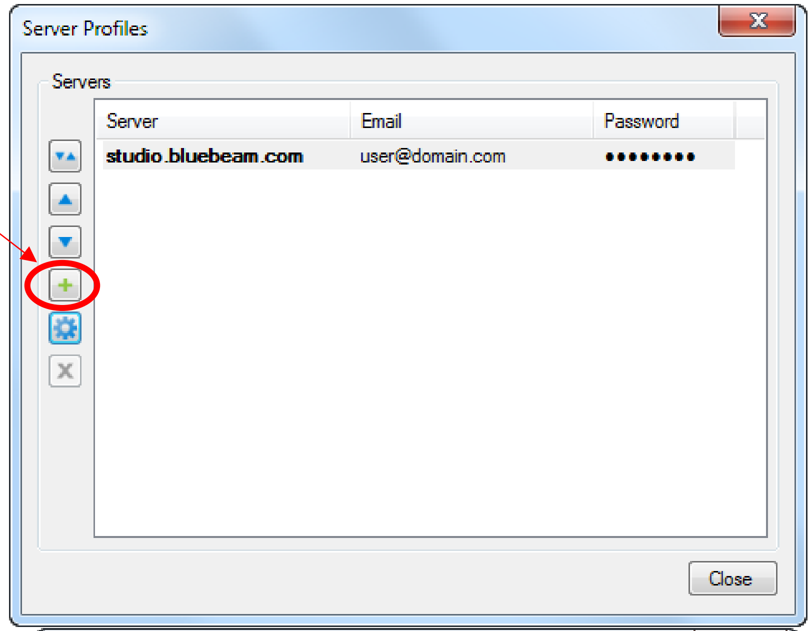
Go to **View** > **Tabs** > **Studio** or press ALT+C to access the Studio tab.

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

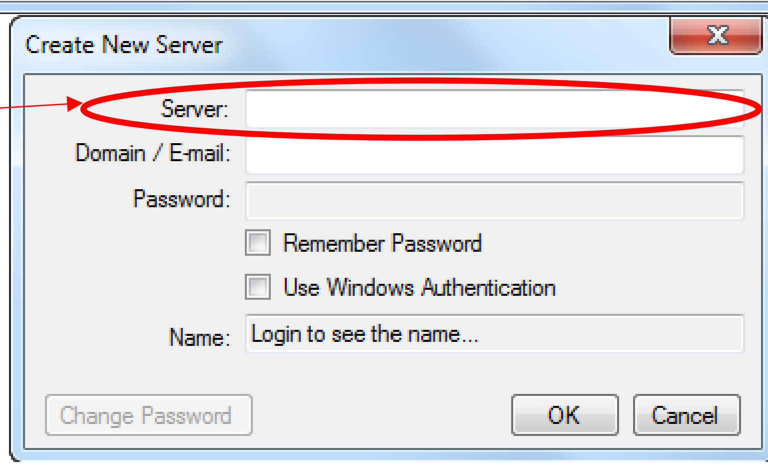


- The **Server Profiles** dialog box appears.

  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

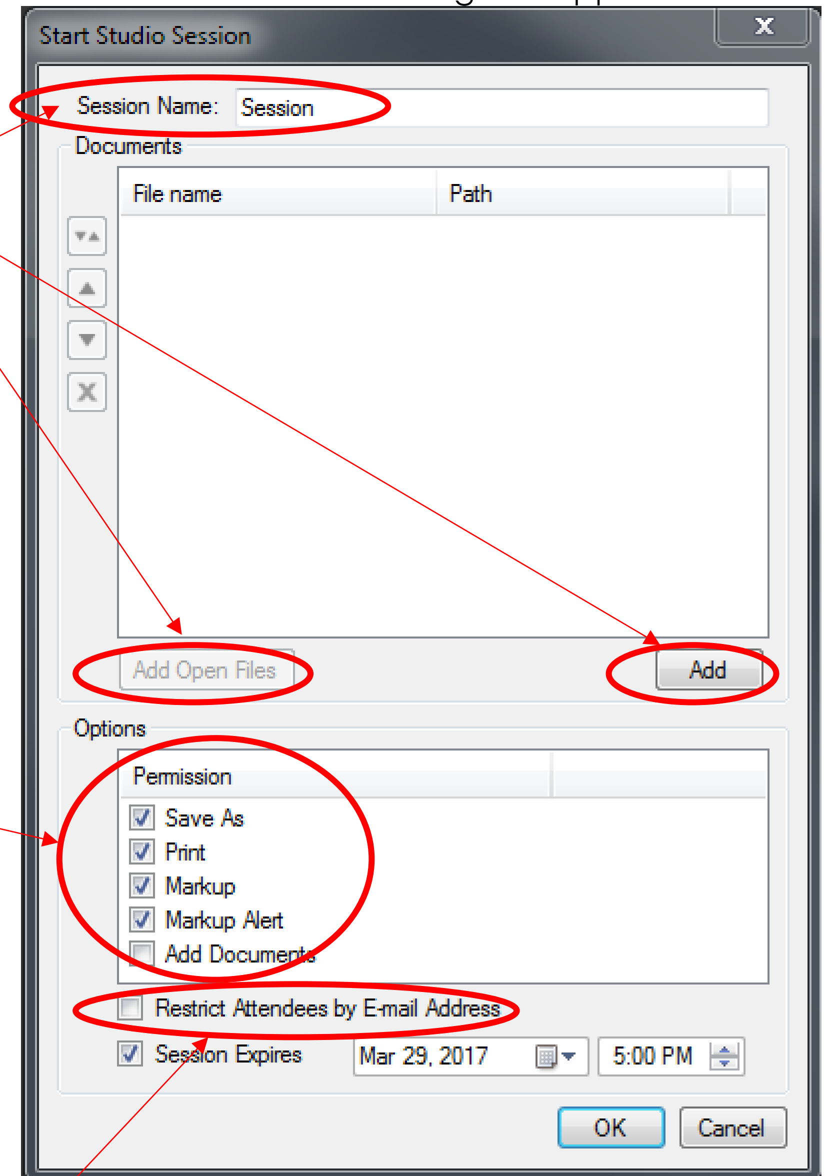


- If this Studio server has been configured to use Active Directory & you would like to use your Windows login, select **Use Windows Authentication**.
  - The **Domain / E-mail** field will be automatically populated when this option is selected.
- If this Studio server has not been configured to use 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**.

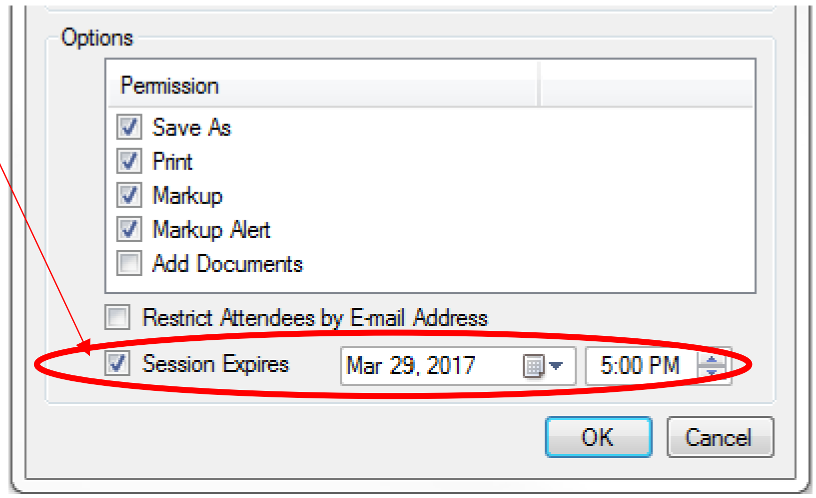
You will receive a verification email after you create the account. Follow the instructions in this email in order to complete the validation process. You must validate the email address or you will not be able to continue using the account.

- **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 **unrestrict** access to the Session by email address, uncheck the **Restrict Attendees by E-mail Address**. This will allow any user with the Session ID to join the Session

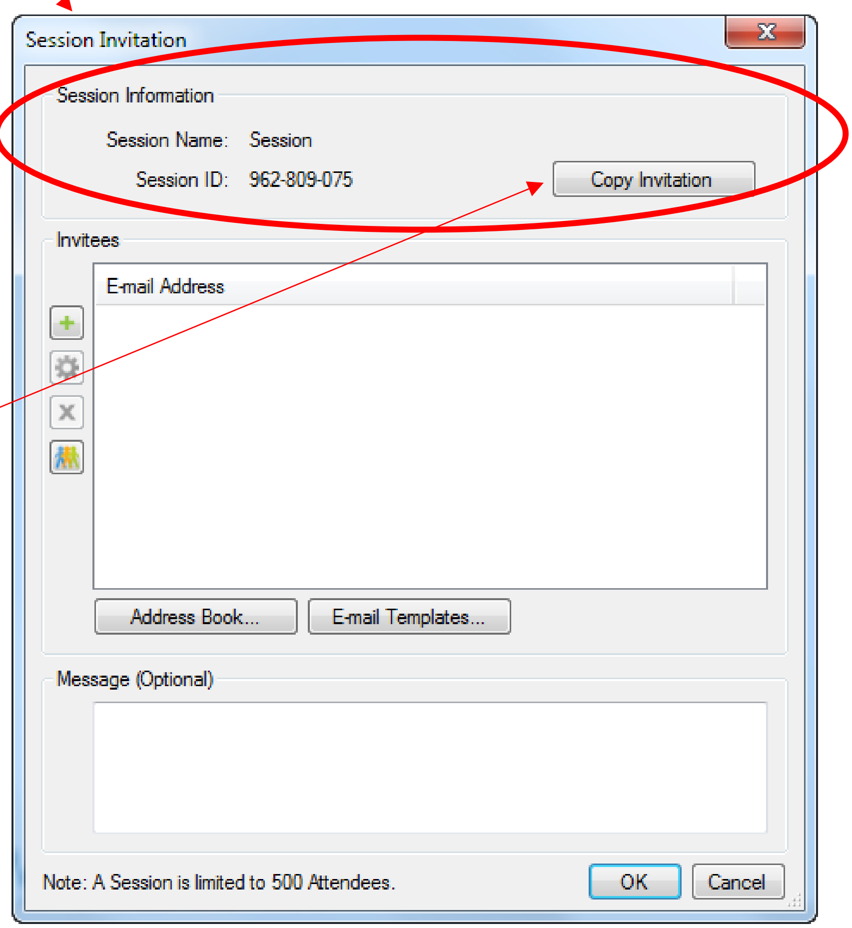
From the **Studio** tab, go to **Start** > **New Session**. The **Start Studio Session** dialog box appears



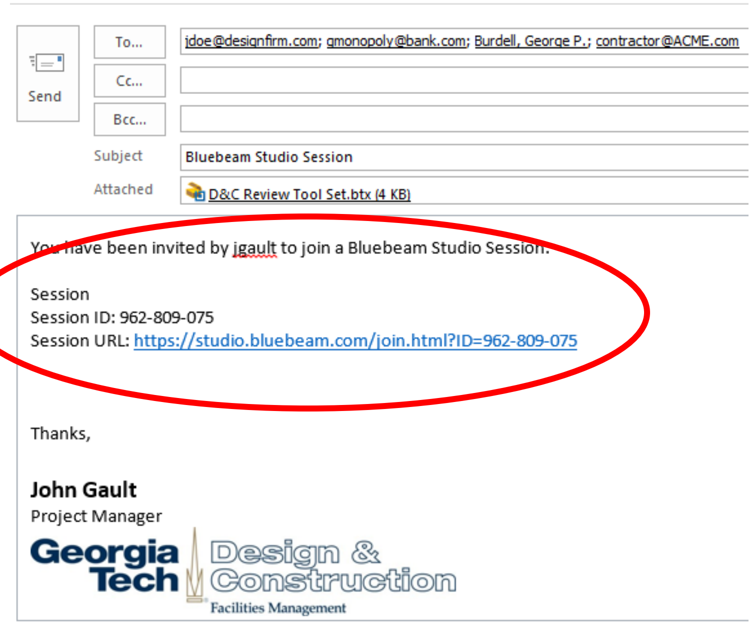
- To set an expiration date for the Session, select **Session Expires** & enter the desired expiration date & time. Expiration dates must be in the future; Revu will not allow a back-dated expiration date.
- Click **OK** to save the settings & upload the files. The **Session Invitation** dialog box will appear



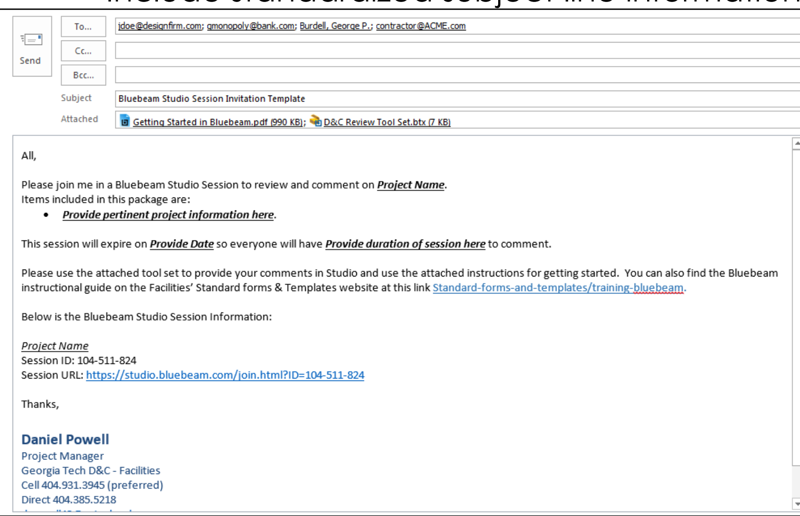
- The Session Information is shown at the top of the dialog box. Copy this information to the clipboard in order to paste it into another program, such as an email message, IM or other document, click **Copy Invitation**.



- Within an email program, open a new email message & paste the copied information into the body. Your **Bluebeam user name** will appear in the first line, **the Session ID & URL** (already hyperlinked) will appear as well.



2.2 Email Verbiage & Attachments

Lesson objectives	By the end of this lesson, learners will be able to: • Send GT D&C standard email with attachments to Studio Session Users • Include standardized subject line information
• An email, similar to the one on the right, should be composed & sent to the appropriate stakeholders. An email template is available on the Standard forms & template website. Along with the other Bluebeam Training Tools	

• Located under the **Training** tab	
•	

2.3 Email Subject Line

Include the items to the right in the subject line of the invitation email. As the project dictates, provide more information as needed.

- Begin with "Bluebeam Review"
- Project Name
- Project #

3.0 Stakeholder Page Turn Meeting

3.1 Importance and Timing of Page Turn Meetings

Lesson objectives	By the end of this lesson, learners will recognize the importance of: • Holding stakeholder (in person) page turn meetings

	• Timing of these meetings
Page Turn Meetings	• Page turn meetings give stakeholders an opportunity to voice opinions in person & work through conflicts • Let's face it, this may be the only time some stakeholders review the documents • Reminds some of the expiration deadline • Encourages sharing of ideas & greater collaboration between GT entities • Identify potential budget issues or constraints not typically captured in Studio Sessions • Identify possible "scope creep"
Timing of Meeting	• Page turn meetings should be held 2 to 3 days prior to the expiration of the Studio Session • Gives designers time to incorporate comments into Studio Session • Gives others a chance to attend Studio Session, again or for the first time, after the meeting to add or clarify comments