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# How to replicate your paper-based workflows with Bluebeam Revu and Studio Sessions

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North America  
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## INTRODUCTION

Bluebeam Revu is a PDF-based creation, editing, markup and collaboration tool purpose built for Architects, Engineers and Contractors like you. Revu offers tools and features that enable electronic workflows for all phases of projects. Its foundational elements allow users to replicate paper-based processes and workflows digitally.

This guide is meant to help you transition to our digital tools without disrupting the workflows and processes you're used to. You may print this guide out or use it as a PDF on your computer.

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# 1.0 GETTING STARTED

## Download Revu

If you don't currently have Revu installed on the computer you're using, please reach out to your company's IT admin or license owner for access. If you need Revu before they can respond, you can download a free 30-day trial [here](#).

The following guide is specific to Revu 2018 and 2019. All the functionality exists in earlier versions, but exact instructions will differ because of the interface updates introduced in Revu 2018.

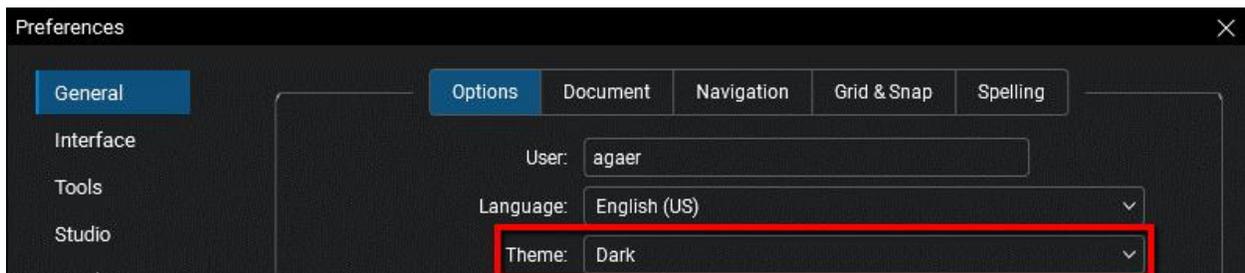
## Interface

Revu allows users to customize the interface, which is controlled by **Profiles**. To ensure these instructions are clear, select the **Revu Profile**.

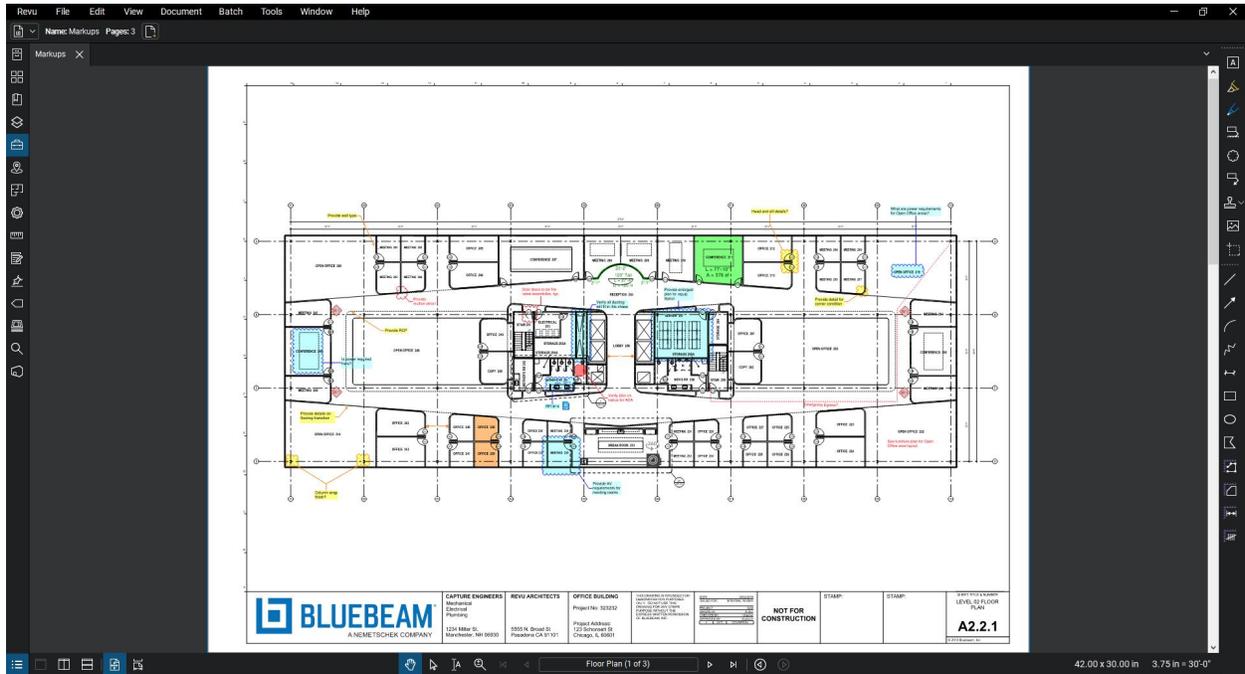
Click the **Revu** menu at the top left of your screen and select **Profiles > Revu**

By default, Revu has a black background in our "Dark" theme. Some users prefer a lighter background, which you can select by switching to the "Light" theme.

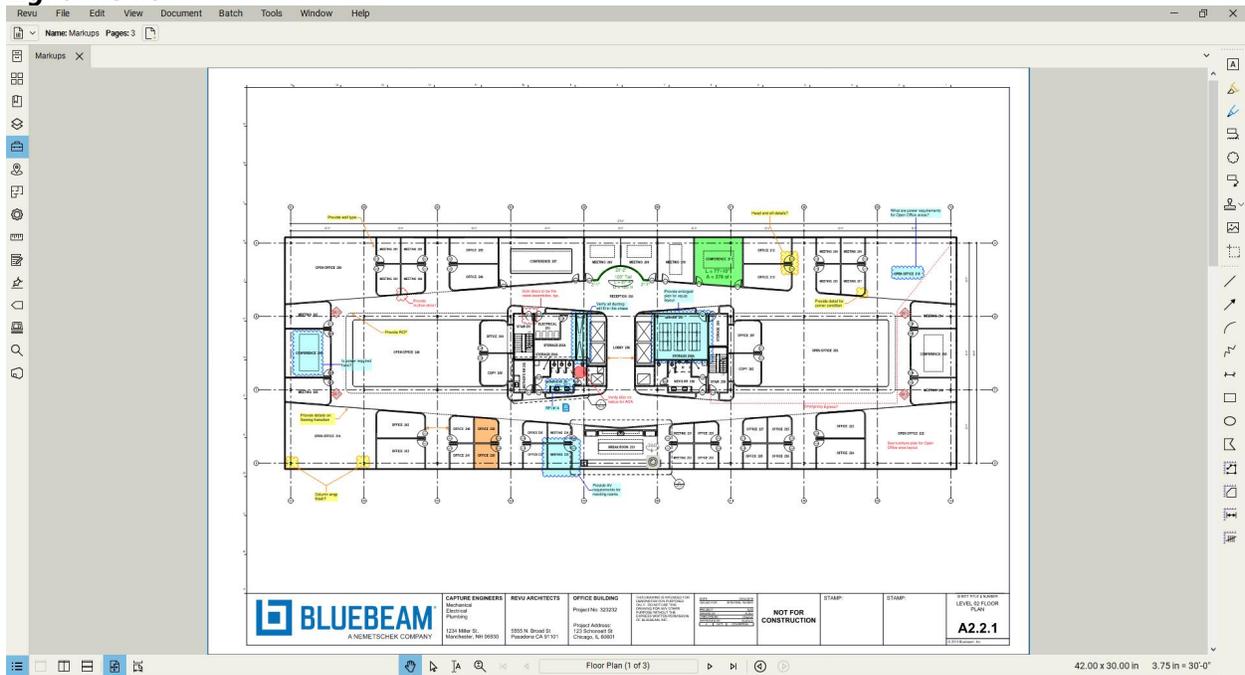
Click the **Revu** button at the top left of your screen and select **Preferences**. In the Preferences window select **General > Options** and select the "**Light**" Theme option and click **OK**.



## Dark Theme



## Light Theme



## 2.0 MARKUP TOOLS

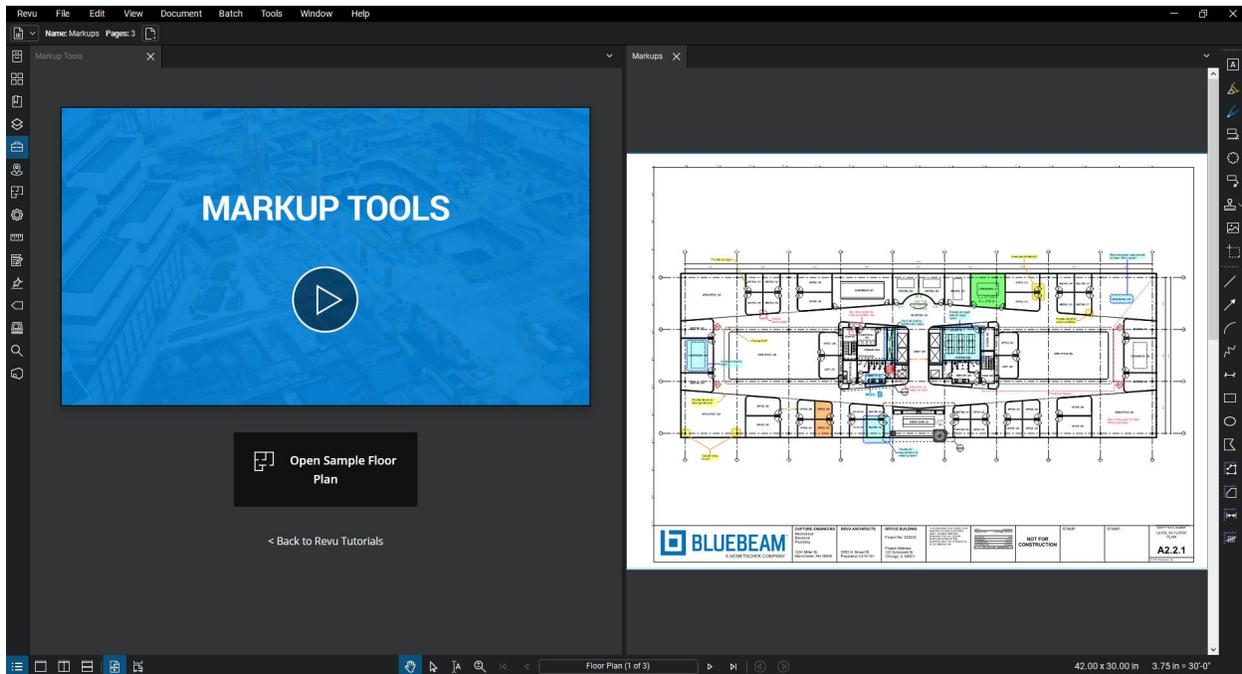
Similar to pens, pencils and highlighters, Revu has a variety of markup tools available to mark up, annotate and redline PDF drawings and documents; the same as you would on paper plans.

### Placing Markups

To activate the markup tools, you'll need to open a PDF. We have a sample you can access from within Revu to use as you work through this guide.

Click **Help > Launch Revu Tutorials**, select **Markup Tools** and click **Next**. There you'll see a 3-minute tutorial video and if you scroll down, you'll see a button to open a sample floor plan. When you open the floor plan, it will split your screen in two. To view the drawing in full screen, you can close the Markup Tools video window by clicking the X on the Markup Tools window tab.

You may want to zoom in or out to reposition the drawings after closing the video tab. To zoom in, place your cursor where you want to zoom in and scroll your mouse wheel up. Scroll your mouse wheel down to zoom out. To move the drawings around on your screen left-click, hold and drag into your desired position.



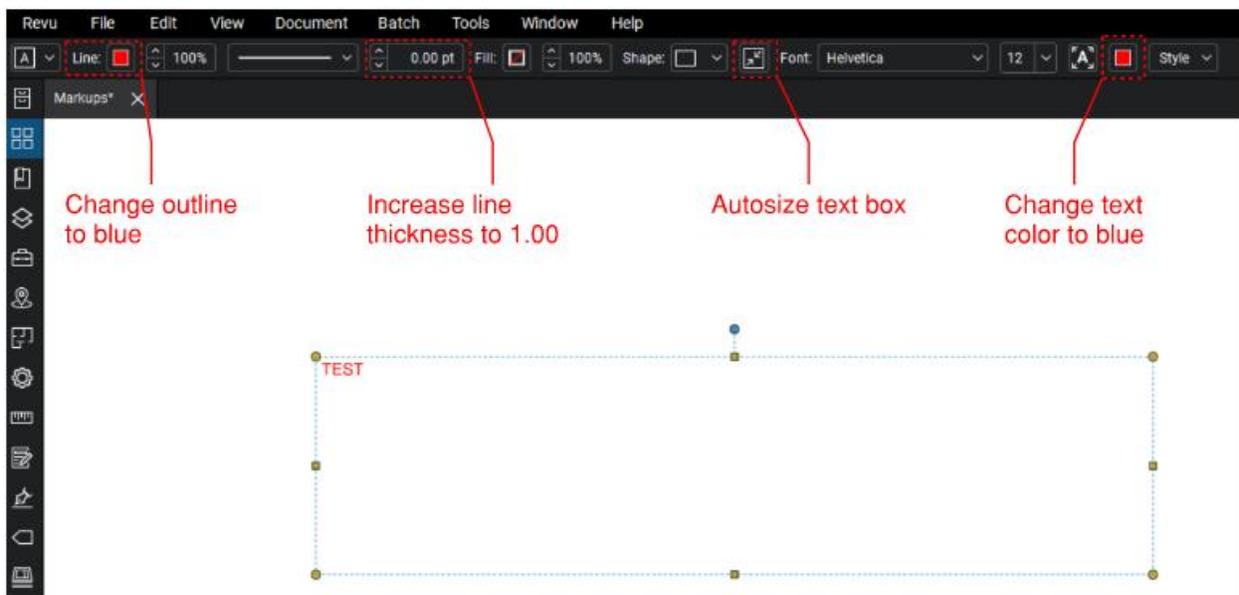
With the sample floor plan open, you can select markup tools from the toolbar displayed on the right-hand side of your screen or by clicking the **Tools** menu at the top of your screen and selecting from the **Markup** options. Go ahead and try a few out now.

## Customizing Markups

In paper-based workflows you may have pens, pencils and highlighters of different colors to signify different things. In Revu, markups can also be placed in a variety of colors to suit your needs. By default, text and shape markups are red and the highlighter is yellow, but that can all be easily customized.

Select the **Textbox** tool  from the tool bar on the right-hand side of your screen and click and drag a box on the drawing. **Type in "TEST"** and press the **Esc** key.

Once Esc is pressed, the markup will be highlighted with a dashed blue line and yellow control points as shown below. The Dynamic Properties Tool Bar will appear at the top of your screen as well. This will adapt based on the markup you have selected and will allow you to change the properties of the tool as needed. Go ahead and change the properties of your selected markup as shown in the screen shot below.



You can set these properties as your default for this tool so that every time you select the Text Box tool going forward it uses these properties. If you would like to set this as your default, **right-click** your markup and select "**Set as Default**" from near the bottom of the context menu that will appear.

We recommend storing the customized tool for reuse while leaving the default for this tool alone. To do that, please follow the steps in [section 3](#).

### Best Practice Recommendation

While we offer a Pen tool, we recommend using the Text Box tool for any text-based markups or annotations for two reasons. Reason one is that typed text is much easier to read. Reason two is that the text from a Text Box is captured in [the Markups List](#) and can be used in reports down the line, avoiding the need to later transpose notes into a Word or Excel format.

## 3.0 STORING MULTIPLE “DEFAULTS” WITH THE TOOL CHEST

As mentioned above, your current workflows might include pens of several colors, not just a single default. It would be cumbersome to change the properties every time you needed a different color. To address this, Revu has something called the **Tool Chest** to store your custom markups, your “set of pens”, if you will.



On the left-hand side of your screen, click on the Tool Chest icon to open the Tool Chest panel. The Revu Profile we’re using includes some default Tool Sets within the Tool Chest including color coded markups for a multidisciplinary review. There’s also a Tool Set with Design Symbols that can be dragged and dropped right on to any PDF. In addition to these Profile specific default Tool Sets, there are two additional Tool Sets that appear by default in all standard Profiles called My Tools and Recent Tools.

**My Tools** allows you to add your custom markup tools and symbols and automatically assigns a number to each tool. That number becomes a keyboard shortcut. For example, if you hit the 3 key on your keyboard, it will select the third tool in the My Tools Tool Set.

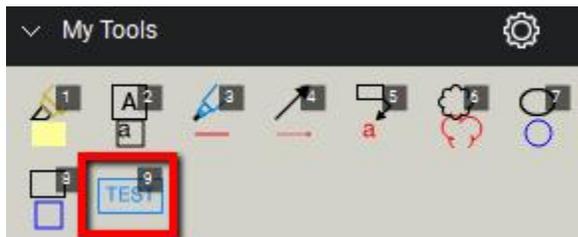
**Recent Tools** saves every markup you place on a PDF so you can quickly reuse frequently used markups over and over. **NOTE:** All the markups in the Recent Tools Tool Set will be cleared out each time you close Revu. If you need to save a tool for later use, you’ll need to add it to one of the other Tool Sets.

### Adding markups to an existing Tool Set

If you’ve customized the properties of a markup and want to save them for future use, you can save them to a Tool Set.

**Right-click your “TEST” markup**, select **Add to Tool Chest** and select **My Tools**.

### Drawing Mode



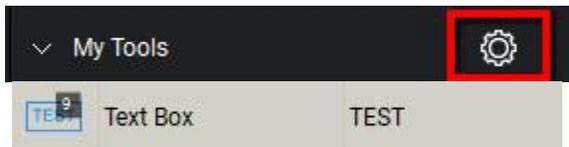
By default, your markup will appear in My Tools exactly how it appears on your PDF. If you select it by clicking on it in the Tool Set and then drop it on your PDF by clicking where you would like it to be on the PDF, you’ll see it’s an exact replica. This is called **“Drawing Mode”** which means it saves the markup exactly the way you created it.

Drawing Mode is very helpful if you make the same comment multiple times. You can save all of your commonly used comments in a Tool Set and simply drag and drop instead of typing text every time. This also works well for symbols like check marks and common design or construction symbology.

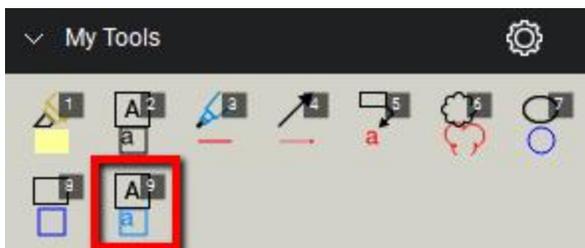
### Best Practice Recommendation

If you'll be saving a lot of markups in a Tool Set in Drawing Mode, it's helpful to change your Tool Set view from **Symbol** to **Detail**. This allows you to see the comments easier.

Click the **gear icon** to the right of the Tool Set title and select **Detail**.



### Properties Mode



If you want to use just the properties of the markup, like colors, font size and style, you can double-click on the markup in the Tool Set or right-click and select **"Properties Mode."** Properties Mode will allow you to select the markup from the Tool Set and drop the tool on the PDF but then type whatever new comment or annotation you need to make. This allows you to have uniform markups with standard

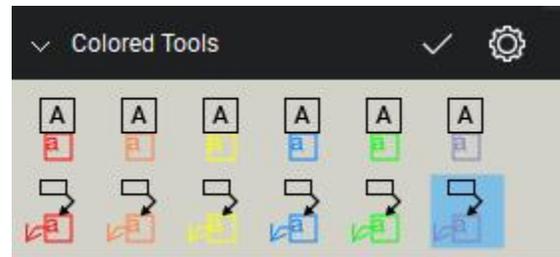
visual properties while getting the flexibility to place whatever shape or comment you need. This is helpful for creating your set of "colored pens." You can create text boxes of various colors and save them all in a Tool Set.

**Right-click your "TEST" markup** in the Tool Set and select **Properties Mode**. Click the markup to select it and click and drag the rectangle on your PDF where you want your new Text Box to be located. Type **"TEST 2."** Don't forget to **Autosize your Text Box** from the Dynamic Properties Tool Bar when done!

To get you started, we've created a Tool Set called **Colored Tools** with a set of color-coded Text Boxes and Callouts for you to have and use. Simply double click on the Tool Set icon below and it will load into your Tool Chest automatically.



Colored Tools.btx



### Best Practice Recommendation

If you'd like to be able to view your Tool Set markups larger, you can zoom in using the slider at the bottom of your Tool Set panel.



## 4.0 ACCESSING MARKUP DATA IN THE MARKUPS LIST

With hand-drawn markups on paper, what we see is what we get. Often, we have to go through all the annotations placed on a drawing and then transpose them to an Excel list or create a report. Not only does this take extra time, it creates data in two different areas and opens us up to risk that the intent of the comment is not accurately captured, especially if the transposing is being done by another person. With electronic markups, data is automatically collected and listed in the Markups List in Revu.

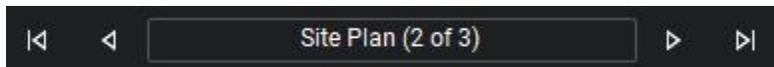
### Navigating the Markups List

Click the Markups List icon  at the bottom left of your screen to open the **Markups List**.

You'll see what looks like an Excel spreadsheet appear across the bottom of your screen with many lines of data. Each row represents a markup on the sample PDF file we are working on. As you click on each of the rows, you will be taken to the sheet that markup is on and that markup will be highlighted.

Click through a few of the rows to see the correlation between the Markups List and the markups on the drawing.

Next, select the original **"TEST"** markup you created by clicking on it on the drawing. You can scroll through the sheets to find your original **"TEST"** markup using the back and forward buttons below the drawing.



Notice that the markup data is highlighted for you in the Markups List when you click the markup. Without any extra work, Revu captures information associated with your markup, including the sheet your markup is on, your name, the date you placed the markup and the text of the markup.



Markups List		Search					
Subject	Page Label	Status	Author	Date	Comments		
Text Box (1)							
A Text Box	Floor Plan		agaer	3/26/2020 8:08:53 AM	TEST		

Beyond this information, static information can be added to markups, like a subject, label and layer, and saved in the Tool Set so it shows up every time the tool is used. Dynamic information can also be added based on your sheet setup, like page labels, markup location on a sheet and calibration. This means you can capture large amounts of useful data with minimal extra work. We won't get into that in this guide, but you can refer to the **Deeper Learning** section at the end of this guide to learn more.

## Reporting

With the data captured in the Markups List there may not be the need to generate a separate report. However, it is an option.



Click the Summary icon and choose the CSV Summary. When the **Markup Summary** window pops up, leave the defaults as is and click **OK**. This will automatically create an Excel-based summary and open it on your computer. There are other types of summaries as well that you're welcome to explore.

## 5.0 COLLABORATING USING STUDIO SESSIONS

If you've made it to this point you're now familiar with the core features of Revu: Markups, the Tool Chest and the Markups List. With that knowledge, you can now add markups and annotations to PDF drawings in a similar way to how you would add markups and annotations to paper drawings.

Since design and construction is a team effort, collaboration is necessary. Revu includes a collaboration tool at no additional charge called **Studio Sessions**.

Studio Sessions was designed to replicate the experience of an in-person review digitally. Instead of a paper drawing set being placed in a conference room, a PDF drawing set is uploaded to a Studio Session. Invites are sent to all participants, which allow them to enter the Session, view and mark up the drawings and see everyone else's markups in real time as they are placed on the drawing.

Invitees don't even need to own a license of Revu to participate in a Session. They can join a Session you host through a free trial of Revu (active or expired) and have full access to view and mark up the drawings at no charge. This allows all the necessary people to be involved in a review, regardless of where they are in the world or what technology they own.

For reviews that last multiple days or a week or more, people can come and go as they please. Each time they rejoin the Session they will see all of the markups that others have added while they were away. This is especially useful for project teams across time zones and around the world.

For those reviews that take place with multiple people at once, many teams will set up a conference call to enhance the Studio Session experience and emulate an in-person meeting. With this method, users can see the drawings and comments and talk through each one, resolving any conflicts in real time with all of the necessary context.

### Studio Sessions Quick Facts

1. Studio Sessions are accessible through Revu.
2. Multiple people can view and mark up the same PDFs from any location.
3. As an attendee adds a markup, all other Session attendees see the markup in real time.
4. Only the attendee who adds a markup can change it, providing security and accountability.
5. Sessions can last as long as required to complete the review
6. The markup tools and Tool Chest operate the same way in a Session as they do outside a Session in Revu. The Markups List operates in mostly the same way, with some advanced customizations limited in the Session environment.
7. Sessions can hold up to 500 attendees.
8. Up to 5,000 PDFs can be uploaded to a single Session.

## How to Access Studio Sessions

Studio Sessions are accessed within Revu by clicking the **Studio** icon  at the left of your screen.

Once in the Studio panel, click the **Sign In** button and select **Create Account**. Your display name will be how others are able to identify you in a Studio Session. This will also be the name associated with any markups you place in a Session. First and last name, and first initial last name are two common choices. Once you create your account, you'll need to verify through your email.



## Creating and Joining Studio Sessions

Once you have created your Bluebeam ID you'll be able to log in to Studio from any computer that has Revu installed. This will also allow you to log in to Studio on any iPad that has the Revu or Revu in View Mode (the free viewer) installed.

If you would like to create a new Session to invite other collaborators to, first select the **Sessions** icon followed by the **Add** icon and select **New Session**.



From there, the **Start Studio Session** window will appear.

1. Session Name: Enter "**Markup Session Test**" for the name of your Session
2. Documents: Click **Add Open Files** to upload the PDF sample file you've been working on
3. Options: Leave the defaults
4. Click **OK**

You'll now see the Studio Panel change, showing the Session name, a 9-digit Session ID, Attendees, Documents and Record. A **Session Invitation** window will also pop up on your screen.

In this window, you'll be able to invite collaborators to your Session by clicking the **Add Email** icon  and entering the email addresses of the people you would like to invite. You can skip this for now by clicking **OK**. If you invite people, they will receive an email invite and be prompted to download Revu and create a Bluebeam ID if they have not already.

**Attendees** will list all of the people that have joined the Session at least once. If the name appears in bold, it means they're currently in the Session and you can click on their name to follow them. Following an attendee means you'll see exactly what they are looking at and will be able to watch their cursor move in real time. You can click anywhere on the drawing to stop following an attendee.

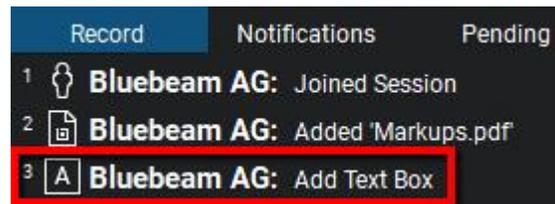
**Documents** is the list of all of the documents uploaded into the Session and available for attendees to view and mark up.

The **Record** is a list that keeps track of all activity in a Session, like meeting minutes. This includes time stamped activities of when attendees join and leave the Session, place or edit markups, etc.

Click on the **Markups document** you uploaded to the Session from the **Documents** section. You likely still have the original Markups drawing sample open but now have the Studio version open as well. You can tell a document is the **Session version** because the **Session icon** will precede the name of the document at the top of your screen.



Open the **Tool Chest** and select your saved "TEST" markup and place it on the Session version of the drawing. Now, go back to the Studio panel and notice that the Record has updated showing that you placed a markup.



Now that you've created your own Session, you may also be asked to join Sessions other people have created. If you receive a Studio Session invite from someone, all you have to do is click the link provided. That will open Revu and prompt you to log in with your Bluebeam ID.

## Leave a Session

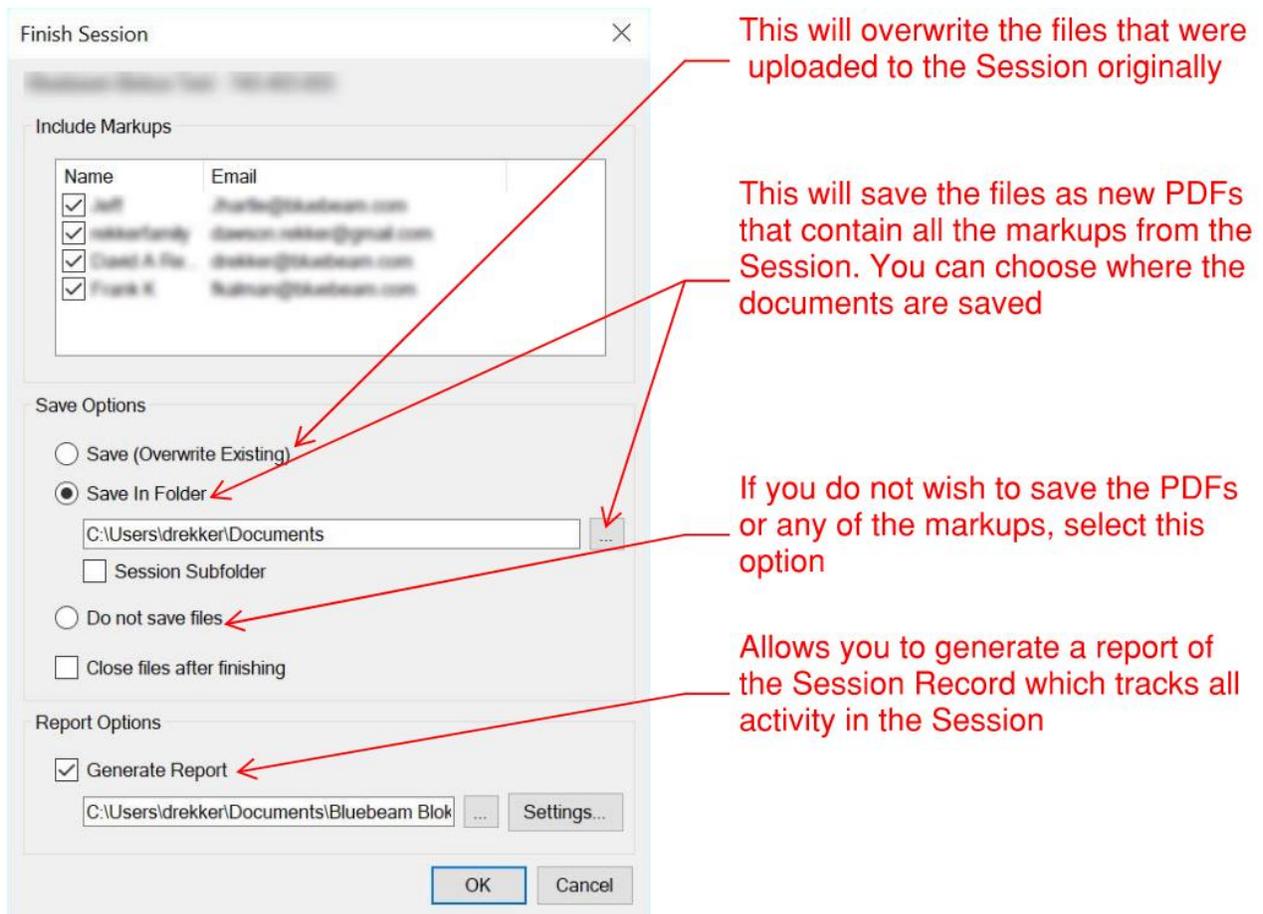
Whether you're in a Session that you created or joined one that someone invited you to, you'll want to leave when you're finished, either for good or for the time being. This would be the same as walking out of a conference room that the paper drawings are in.

Click the **Leave Session** icon  at the top of the Studio panel to leave the Session.

## Finish a Session

If you created the Session and the Session is over, you can **Finish** the Session. This is would be the same as rolling the paper drawings up and removing them from the conference room. You will likely want to keep all the markups and generate reports to memorialize the Session, which you can do during the finish process.

Click the **Finish Session** Icon  at the top of the Studio panel and select your options to finish a Session.



The screenshot shows the 'Finish Session' dialog box with the following sections and options:

- Include Markups:** A table with columns 'Name' and 'Email'. All four entries are checked.
- Save Options:** Radio buttons for 'Save (Overwrite Existing)', 'Save In Folder' (selected), 'Do not save files', and 'Close files after finishing'. A text box shows 'C:\Users\drekker\Documents' with a browse button (...).
- Report Options:** A checked checkbox for 'Generate Report' and a text box showing 'C:\Users\drekker\Documents\Bluebeam Blok' with a browse button (...) and a 'Settings...' button.

Red annotations with arrows point to specific options:

- An arrow points to the 'Save (Overwrite Existing)' radio button with the text: "This will overwrite the files that were uploaded to the Session originally".
- An arrow points to the 'Save In Folder' radio button with the text: "This will save the files as new PDFs that contain all the markups from the Session. You can choose where the documents are saved".
- An arrow points to the 'Do not save files' radio button with the text: "If you do not wish to save the PDFs or any of the markups, select this option".
- An arrow points to the 'Generate Report' checkbox with the text: "Allows you to generate a report of the Session Record which tracks all activity in the Session".

## 6.0 DEEPER LEARNING

We hope you found this guide valuable! If you'd like to learn more about any of these features in greater detail, Bluebeam.com has a wealth of helpful, free content. Below are some suggestions to get started.

**Start Using Revu Today** – A free 35-minute self-guided training course designed to get you off to a solid start. <https://learn.bluebeamuniversity.com/start-using-revu-today>

### Free Feature Specific Training Videos

- **Markups** - <https://support.bluebeam.com/training-videos/markup-tools/>
  - **PDF Markups**
  - **Customizing Markups**
  - **Tool Chest**
- **Markups List** - <https://support.bluebeam.com/training-videos/markups-list/>
  - **Markups List**
  - **Custom Statuses**
- **Drawing Management** - <https://support.bluebeam.com/training-videos/drawing-management/>
  - **Compare Documents**
  - **Overlay Pages**
- **Studio Workflows** - <https://support.bluebeam.com/training-videos/studio-workflows/>
  - **Studio Basics and Log In**
  - **Studio Sessions**

### Solutions – Bluebeam.com > Solutions

This drop down includes a variety of resources by Role and Workflow

### Training resources within Revu – Help > Launch Revu Tutorials

Explore the in-app tutorials and sample drawings.

