
Studio Prime Quick Start Guide

English/US
January 2021



INTRODUCTION

Studio Prime allows you to gain control and visibility over your organization's Bluebeam Studio activity. Prime provides advanced capabilities for your organizational needs, including the ability to manage access to Studio content, get insights from reports on user activity, configure folder automations to optimize repetitive steps, and integrate with other systems—all available through a simple and intuitive web application.

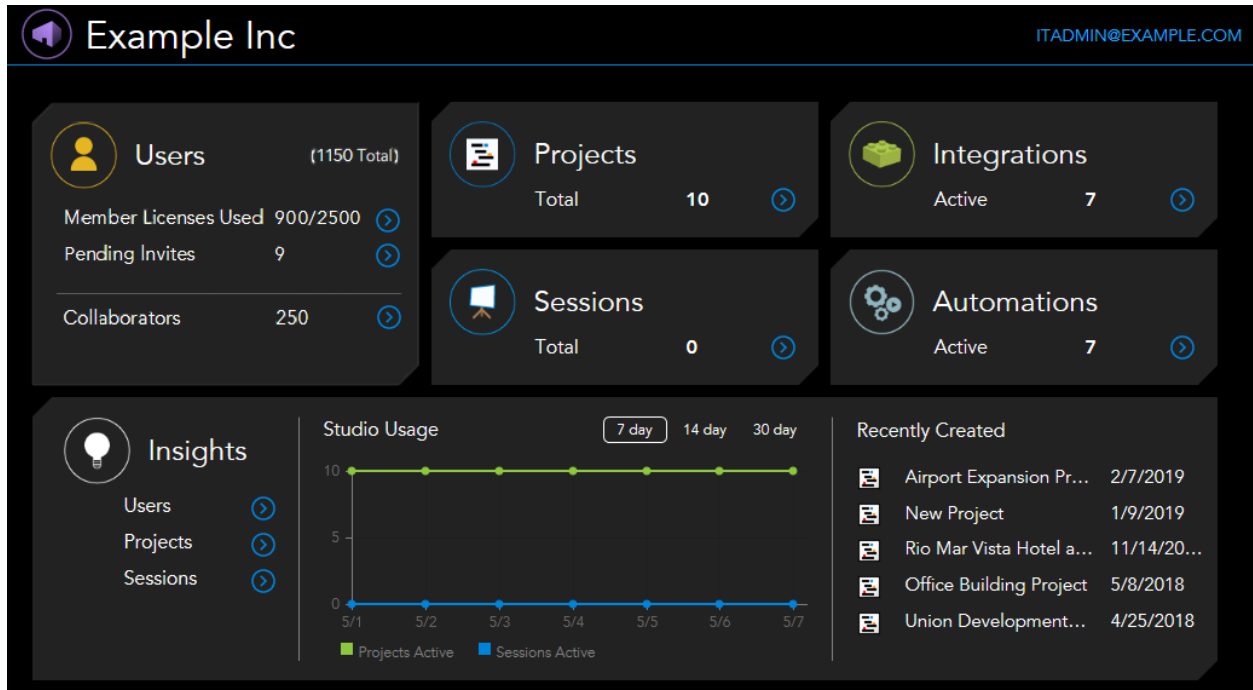
This guide is for the new Prime admin and introduces you to the administrative features and reporting you'll need to get started managing your organization in Studio.

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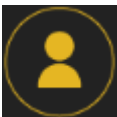
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GETTING AROUND STUDIO PRIME: THE DASHBOARD

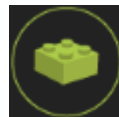
Log into Studio Prime at <https://studio.bluebeam.com/> using your BBID. Upon logging in, you will see the dashboard. Designed with ease of use in mind, the dashboard is highly interactive and simple to navigate.



The dashboard is divided into groups that, when clicked, take you to different parts of Studio Prime. These include:



Users: Click to manage Members and Collaborators plus pending invitations to join the Studio Prime account.



Integrations: Click to manage integrations to the Studio Prime account through the API.



Projects: Click to manage Studio Projects.



Automations: Click to manage folder automations.




Sessions: Click to manage Studio Sessions.

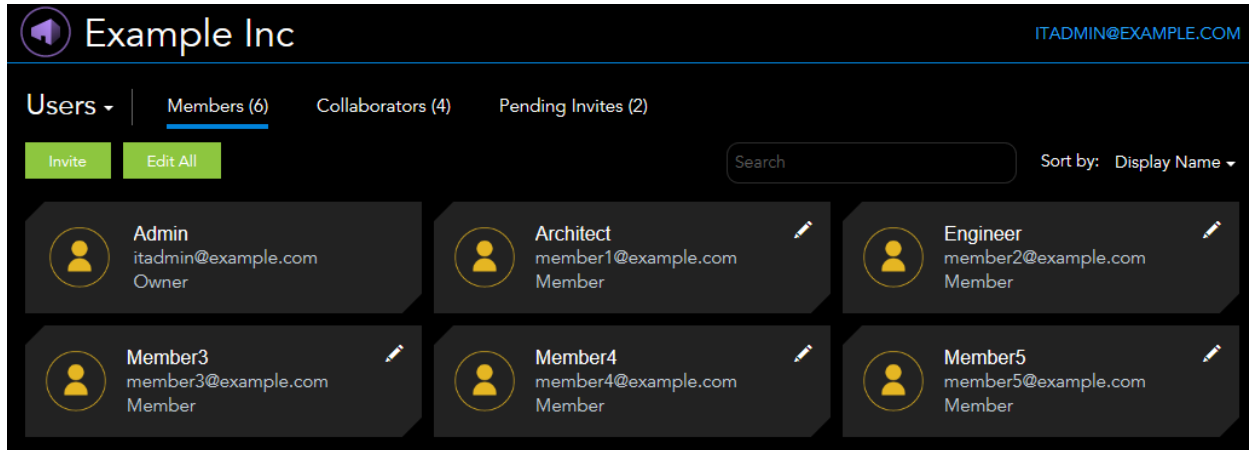


Insights: Click to run reports on Projects, Sessions, and Users managed by the Studio Prime account.

In addition, toward the bottom of the dashboard you can find a Studio Usage graph, a visual representation of the active Projects and Sessions managed in Studio Prime over the past 7, 14, or 30 days, and a list of the most recently created Projects and Sessions.


USER MANAGEMENT

User management in Studio Prime is done on the Users page. To access it, click  **Users** on the dashboard.



Users are grouped by **Members** and **Collaborators**. Members are Studio users, often employees, who are invited and join the Studio Prime account and their Projects, Sessions, and accounts are managed in Prime. Each Member is assigned one of the roles described below. Collaborators are Studio users who are invited to participate in Projects and Sessions that belong to Members and are thus tracked in Studio Prime but their Projects, Sessions, and accounts are not managed there.

To view a list of either group, select the appropriate tab along the top of the Users page. A third tab, **Pending Invites**, is available to view users who have been invited to become Members but not yet accepted. More on inviting Members later. **Search** and **Sort By** functions are available to further refine the users shown on the dashboard.

Clicking on a user will reveal details about them, including Project and Sessions owned or attended by them, as well as options to modify their access to Studio or Prime. Alternatively, hover over the  **Edit** icon near their name for quick access to these options or, in the case of Members, to change the Member role of an individual. **Edit All** will allow you to edit multiple users at the same time.

Lastly, click **Invite** to invite new Members. Member roles and inviting new users are described below.

MEMBER ROLES AND PERMISSIONS

Studio Prime consists of three roles for Members:

- Member
- Admin
- Owner

Each of these roles have certain permissions within Studio Prime. These roles and the associated permissions are described below.

A note about Collaborators: as they are not Studio Prime Members of your account, they have no permissions or capabilities therein, so the roles and permissions discussed below do not apply to them.

Member

This is the basic role assigned to a user invited to join Studio Prime. A Studio user can only be a Member of one Studio Prime account. Assign this role to employees of your organization who should be managed in Prime. All preexisting Sessions and Projects created by Members will be moved into Studio Prime and made visible to Administrators.

Members have the following abilities in Studio Prime:

- Can create Studio Prime managed Projects and Sessions.
- Can leverage the Studio API via authorized apps.

Admin

This is an administrative role that can be assigned to any Member by an Owner or another Admin. There can be multiple Admin in a Studio Prime account. Assign this role to those in your organization you want administering other users, for example I.T. Managers, Compliance managers, and so on.

Admins have the following abilities in Studio Prime:

- All Member/Default functionality as listed above.
- Can view and join any Studio Prime managed Projects and Sessions.
- Access to Prime Portal admin functions.
- Can manage users, including the ability to invite new Members and manage Member roles.
- Can manage Collaborators, including the ability to block access to Studio Prime managed Projects and Sessions.
- Can manage Projects and Sessions, including the ability to transfer ownership of a Project or Session and delete Projects or Sessions.
- Can manage Integrations, approve new application integrations, and disable existing application integrations.
- Can create and manage Project Folder Automations.
- Can generate Studio Insight reports.

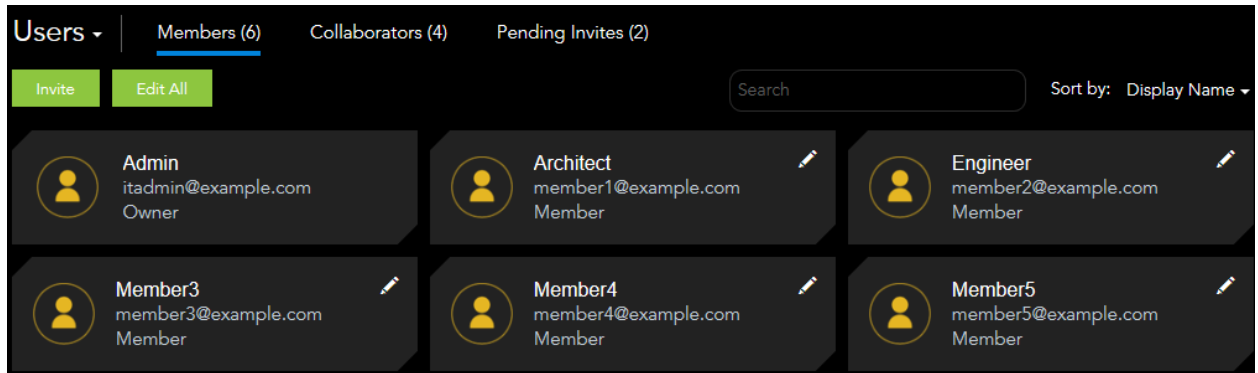
Owner

The Owner role is assigned to a user when the Studio Prime account is established. This user has all the functionality of an Admin plus the ability to view Studio Prime license information. Additionally, their permissions cannot be modified by another user. The Owner has all Admin functionality as listed above. To change the Prime Owner, please contact Bluebeam.

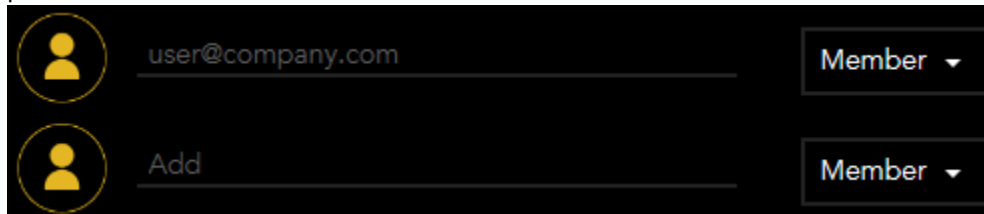
INVITING NEW MEMBERS

Admins and Owners can invite new Members. Inviting individuals outside your organization to be Members is not recommended as intellectual property that they might have in a Session or Project they own will be made visible in your Studio Prime once they accept the Member role. People outside your organization can still take an active part in Prime as Collaborators. You do not need to invite Collaborators; they are added automatically from Projects or Sessions that are managed in Prime. To invite new Members:

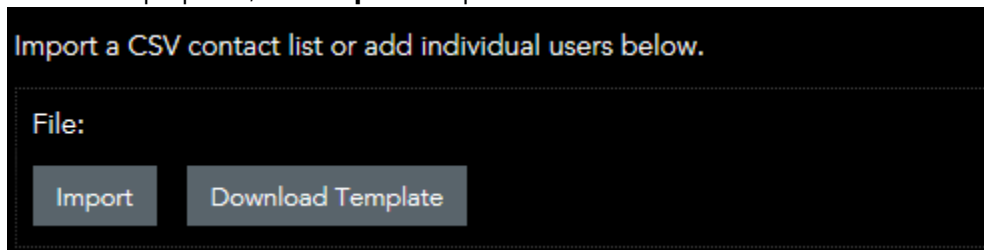
1. Log into the Studio Prime portal and click  **Users**. The Users page is opened to **Members** by default.



2. Click **Invite**. The **Invite Members** page opens.
3. When inviting a limited number of Members, you can enter their email address in the user fields provided and select their member role from the associated menu.



4. To invite a large number of Members at the same time, importing a CSV list is recommended. Click **Download Template** to get a copy of the CSV template to use for this operation and, once it has been prepared, click **Import** to upload it.




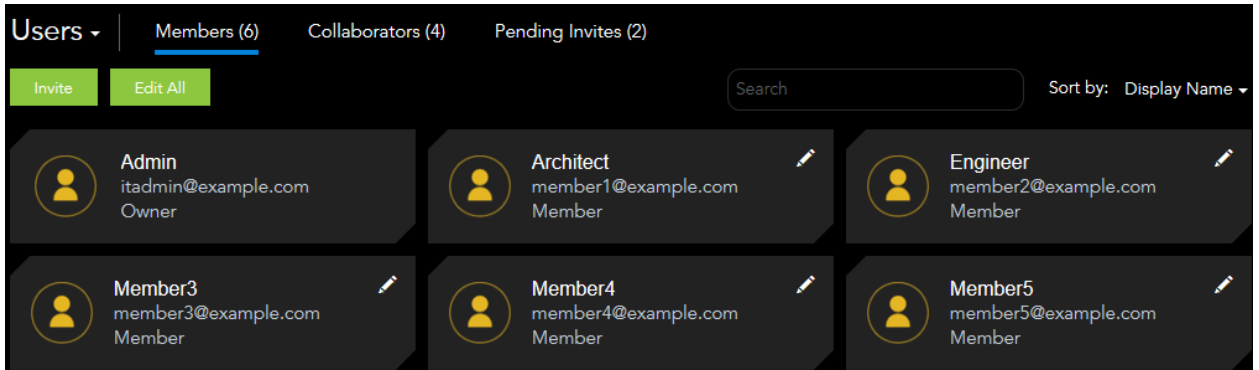
5. Add a customized message in the **Welcome Message** field (optional). Note that while this is optional, it is highly recommended as adding a personalized welcome message, including an email signature similar to your own, can help the recipient identify you as the person sending the invite and make the less likely to disregard it.
6. Click **Send Invitations**. Invited users will show up in **Pending Invites** until they accept the invite.


HOW TO HANDLE USERS WHO HAVE NOT ACCEPTED AN INVITE

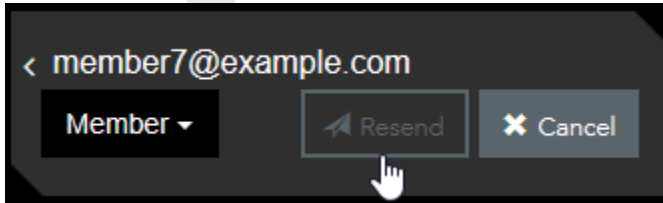
When a user has not accepted an invitation to join your Studio Prime account after a sufficient amount of time has passed, you can resend the invitation to be assured that they have received it.

To resend an invitation:

1. Log into the Studio Prime portal and click  **Users**. The Users page is opened to **Members** by default.



2. Click **Pending Invites** tab.
3. Hover over the  **Edit** icon for the desired user and click **Resend**.



4. If you no longer require that account to be a Prime Member, click **Cancel**.

HOW TO HANDLE MEMBERS WHO ARE NO LONGER EMPLOYEES

Handling users who are no longer employees usually entails disabling or revoking their account, but which one you choose often depends on what, if any, Projects or Sessions they own. Disabling a user's account blocks them from accessing Studio without affecting any Projects or Sessions they own. Revoking a user's account removes them from the Studio Prime account along with all their Projects and Sessions.

When an employee leaves, we recommend you take the following steps:

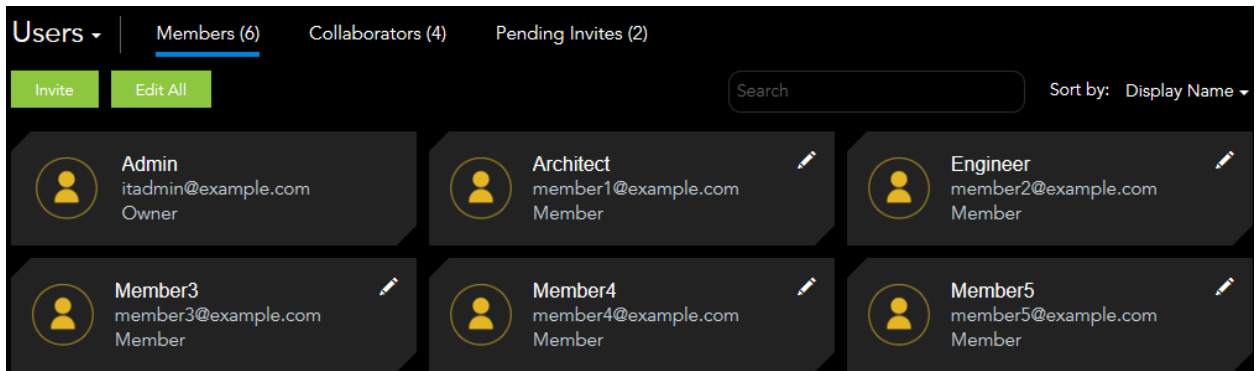
1. Disable their account immediately.
2. Determine what to do with any Sessions and Projects they might own. This typically means finishing them or transferring them to another employee to manage unto completion.
3. Decide if the user should be revoked from Prime. See "Revoking Accounts" below for more details about the effects of revoking accounts.


Disabling Accounts

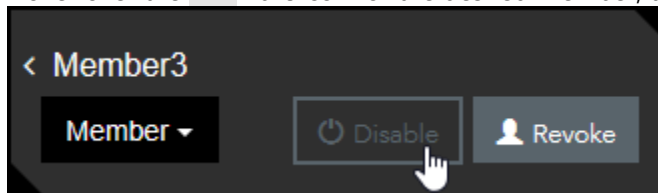
Disabling Member accounts will block them from logging into Studio and joining any Sessions or Projects while keeping their Projects and Sessions active for others. Disabled Members continue to count toward the Studio Prime account's total user count.

To disable a Member:

1. Log into the Studio Prime portal and click  **Users**. The Users page is opened to **Members** by default.



2. Locate the desired Member (if necessary, utilize the **Search** function).
3. Use one of the following methods to disable Members:
 - Hover over the  **Edit** icon for the desired Member, then click **Disable**.



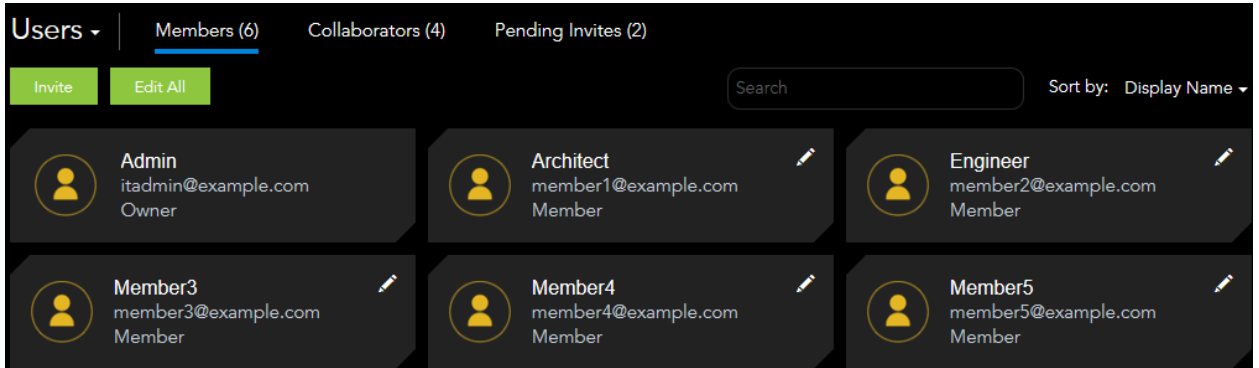
- Click the Member's card to load their profile, then click **Disable User**.
- Click **Edit All** and click **Disable** for multiple Members to disable several at the same time.

Revoking Accounts

Revoking a Member from a Studio Prime account removes their account as well as any Projects and Sessions belonging to them from Prime. Revoked Members lose access to the Studio API and all other benefits associated with being a Member of the Studio Prime account. Note that this does not delete the account or its Projects and Sessions from Studio, it just means that the user and their Projects and Sessions are no longer managed in Prime, as if they had not been invited in the first place. Revoking cannot be undone; to add the user back to the Studio Prime account, invite them again.

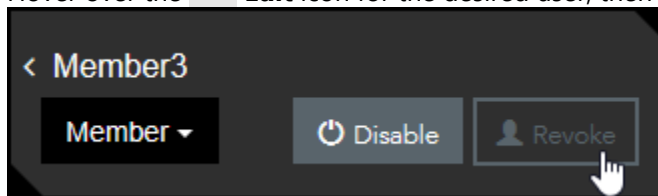
To remove Members from your Studio Prime account:

1. Log into the Studio Prime portal and click  **Users**. The Users page is opened to **Members** by default.



2. Locate the desired Member (if necessary, utilize the **Search** function).
3. Use one of the following methods to remove the Member from your Studio Prime account:

- Hover over the  **Edit** icon for the desired user, then click **Revoke**.



- Click the Member's card to load their profile, then click **Revoke Membership**.
- Click **Edit All** and click **Revoke** for multiple Members to disable several at the same time.


INTEGRATIONS

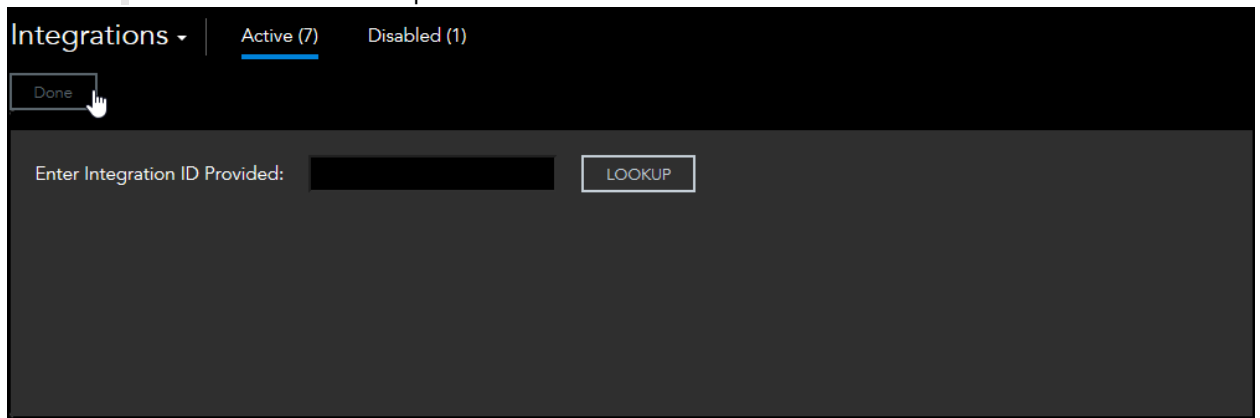
The Studio API allows custom applications to support document processing workflows and integrations such as pushing SharePoint files into Sessions for real-time collaboration and synchronizing Projects files with another DMS.

Once the integration is authorized by an administrator, Members can then authorize the integration application for use with their accounts.

To learn more about the Studio API, visit <https://developers.bluebeam.com/>.



Enable an Integration

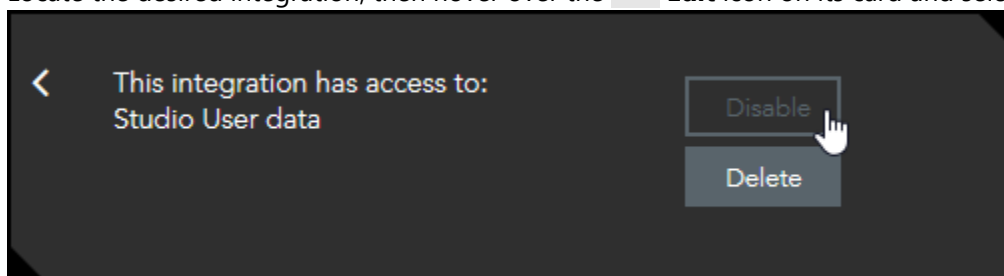
1. Open the Studio Prime Portal and click  **Integrations**.
2. Click **Add New** to reveal the lookup function.



3. Enter the integration ID number provided by the third-party or internal application developer and click **Lookup** to locate the integration and save it. This will connect it to your Studio Prime account and make it active.

Disable an Integration

1. Open the Studio Prime Portal and click  **Integrations**.
2. Locate the desired integration, then hover over the  **Edit** icon on its card and select **Disable**.



REPORTING

Studio Prime has several useful reports available for Projects and Sessions as well as for Members and Collaborators. For illustration, we are going to discuss Project and Session Activity reports. These reports reveal a great deal of information about Projects and Sessions managed by the Studio Prime account.

Project Activity reports include:

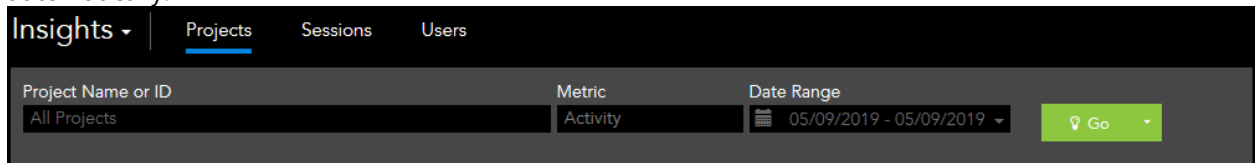
- When documents are added or removed.
- When documents are checked in with changes and comments.

Session Activity reports include:

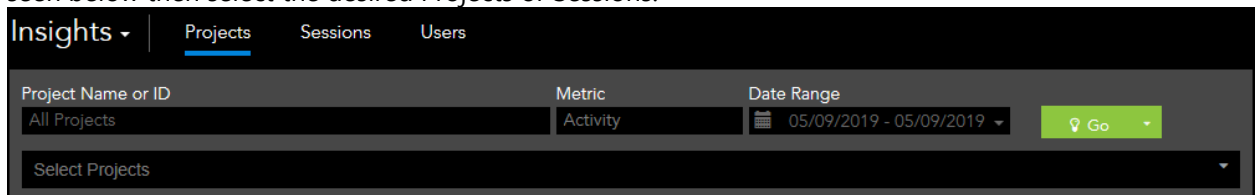
- When documents are added or removed.
- When Markups are added or edited.
- User status changes.
- Markup activity.
- Markup status changes.

To run an activity report:

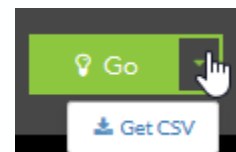
1. Log into the Studio Prime portal and click  **Insights**. The Insights page is opened to **Projects** automatically.



- Click **Sessions** to run a report on Sessions instead.
 - Click **Users** to run a report on user activity across Projects and Sessions
2. By default, the report is run against all Projects or Sessions in the Studio Prime account. To specify which Projects or Sessions to run it against, click inside the **Project/Session Name or ID** field as seen below then select the desired Projects or Sessions.



- You can enter the name or ID of the Project or Session in this second field directly or use a partial name to filter the list.
3. Click inside the **Metric** field and select **Activity and view other reports that can be run**.
 4. By default, the report is run for the current day. To change this, click inside the **Date Range** field, select a date range option or enter a custom date range, then click **Apply**.
 5. Click **Go** to generate the report in Studio Prime.
 - This report can be exported to CSV for importing into another system as well. To do so, click the arrow to the right of **Go** and select **Get CSV**.



For a full breakdown of available reports, [please see the online guide](#).

FOLDER AUTOMATIONS

Studio Prime also provides the ability to carry out Project-level Folder Automations. With Automations, you set up custom workflows that perform preset actions on documents in a specified Project folder. Some examples of workflows that can be performed in a Project include:

- Converting non-PDF files into PDFs
- Carrying out various PDF based automations such as rotating a page or reducing a file size

For more information about available Automations and how to configure them, see:

- [Overview of Project Automations](#)
- [How to Add a Folder Automation](#)

