

DSA PR 18-04.BB17

PROCEDURE: ELECTRONIC PLAN REVIEW FOR DESIGN PROFESSIONAL OF RECORD USING BLUEBEAM 2017

DISCIPLINES: Design Professional of Record (Architect/Engineer)

PURPOSE: This procedure facilitates the Division of the State Architect's (DSA) change from the paper design review process to a digital design review process using DSABOX and Bluebeam Studio Projects and Sessions. This document will introduce the steps required to view and incorporate DSA's design review comments in Bluebeam Studio using Bluebeam version 2017. (For Bluebeam version 2018 and other future versions, use [PR 18-04.BB18: Electronic Plan Review for Design Professional of Record Using Bluebeam 2018.](#)) It will also cover the new in-person back check procedure for obtaining approved documents.

BACKGROUND: All DSA reviews will be completed in a digital format using Bluebeam Studio Projects and Sessions. All new submittals by the Design Professional of Record will be submitted in PDF file format, except for excel spreadsheets and structural software files, to DSABOX per PR 18-04.BB17 or PR 18-04.BB18. A DSA Electronic Plan Review (EPR) Administrator will then create a Bluebeam Studio Project for document control and Bluebeam Studio Sessions for collaborative design reviews.

Bluebeam Studio Projects and Sessions allow internal and external stakeholders to share, view and collaborate in real time in one electronic location. Each submitted project will have a single Bluebeam Studio Project. Within each Bluebeam Studio Project five Bluebeam Studio Sessions will be generated as required for plan review, addendums, revisions, deferred submittals and construction change documents. This gives organization to projects and allows for a well-managed project from registration through certification.

Bluebeam Studio Sessions allows for all Plan Reviewers to join a single Bluebeam Studio Session and comment on a single document set. Color coded markup tools will be used to distinguish each discipline review. This new procedure reduces resources used and is in agreement with both the Governor's Office's and Department of General Services' sustainable policies and goals.

SCOPE: This procedure covers how to prepare documents prior to submission, the process for document submission, how to respond in Bluebeam Studio using comment incorporation as well as the process for submitting post approval documents. DSABOX and Bluebeam Studio Sessions allow internal and external stakeholders to share view and collaborate in real time in one electronic location. Plan Reviewers will be able to markup documents using discipline-specific, color coded tools that will record and date stamp all comments in the Bluebeam Studio session. Comments can then be picked up and incorporated in real time. The close out of comments will take place in person in a DSA back check room before final approval and stamp out. Over-the-counter reviews will also be digital per [PR 18-09.BB17: Electronic Plan Review for Over-the-Counter Projects Using Bluebeam 2017](#) and/or [PR 18-09.BB18: Electronic Plan Review for Over-the-Counter Projects Using Bluebeam 2018.](#)

**ELECTRONIC PLAN REVIEW FOR DESIGN PROFESSIONAL OF RECORD USING
BLUEBEAM 2017**

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PROCEDURE:

Refer to [PR 17-03: Project Submittal Appointment Process](#) for Registration and Project Document (including fee submittal) requirements.

1. DRAWING AND DOCUMENT PREPARATION PRIOR TO SUBMISSION

1.1. Installing Bluebeam and Setting up a Bluebeam Studio Account

- 1.1.1. Prior to preparing drawings, consult Appendix A to install Bluebeam, set up a Bluebeam Studio account and join a demo session

1.2. Prepare Documents

NOTE: This preparation is required on all submissions that will be put in DSABOX and Bluebeam. Non-compliance with the following can be cause for the submittal to be rejected.

As described in this procedure Bluebeam eXtreme is necessary to prepare the PDF documents. If the software cannot be procured, please contact DSA Regional Office for possible solutions at the following email accounts:

- Oakland – OakEPR@dgs.ca.gov
- Sacramento – SacEPR@dgs.ca.gov
- Los Angeles – LAEPR@dgs.ca.gov
- San Diego – SDEPR@dgs.ca.gov

- 1.2.1. Prepare Scanned Drawings (If not applicable skip to 1.2.2)

Note: Scanned documents are slow to regenerate in Bluebeam; therefore all scanned documents are required to go through the preparation section.

- 1.2.1.1. If the file is an Image file (i.e. JPEG, TIFF, PNG, GIF, BMP) skip to 1.2.1.2.2

- 1.2.1.2. If the File is a PDF file

- 1.2.1.2.1. Export file to JPEG – Go the File Ribbon (located at the top of the Bluebeam screen)

- 1.2.1.2.1.1. Select the Export Icon

- 1.2.1.2.1.2. Select JPEG

- 1.2.1.2.1.3. Select New Folder

- 1.2.1.2.1.4. Double left-click on the New Folder to open

- 1.2.1.2.1.5. Select Staple

- 1.2.1.2.1.6. Close JPEG Viewer

- 1.2.1.2.2. Convert Image file to PDF file

- 1.2.1.2.2.1. Select Create Icon

- 1.2.1.2.2.2. Select From Multiple Files

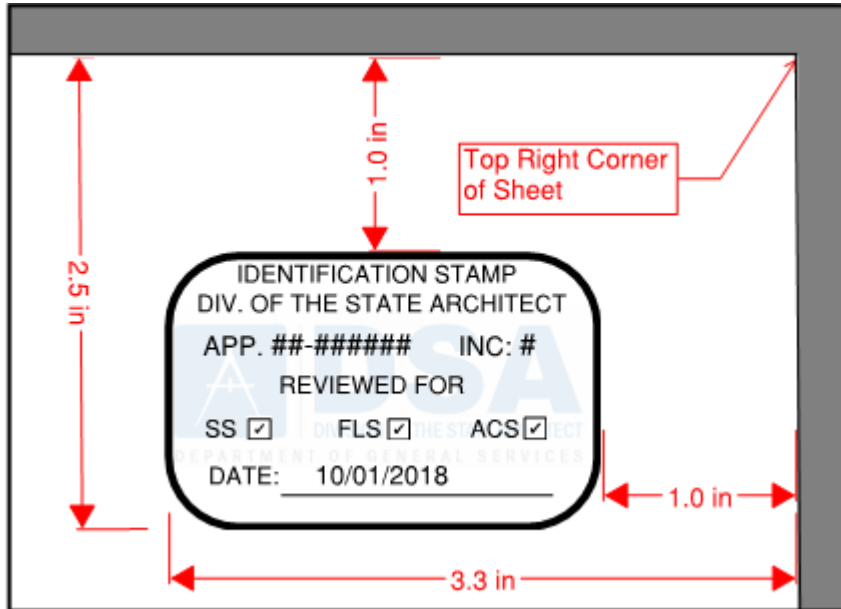
- 1.2.1.2.2.3. Select Image File

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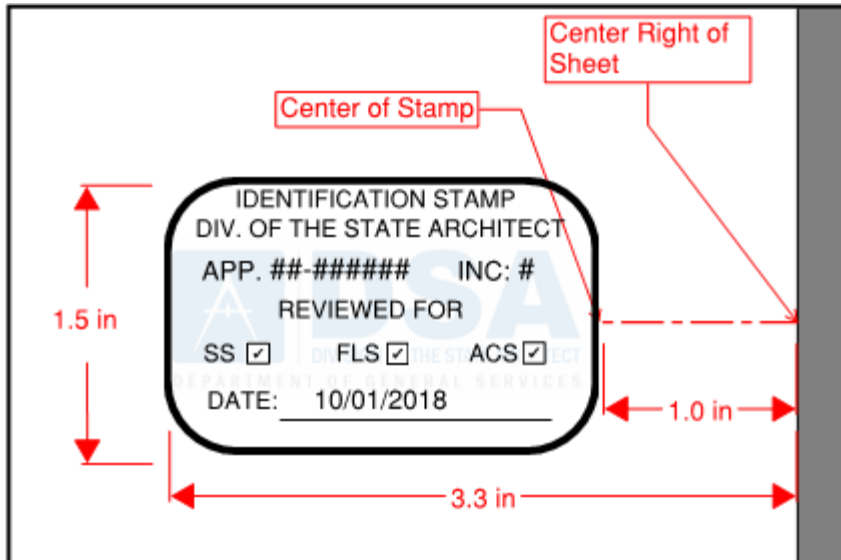
- 1.2.1.2.2.4. Type Ctrl+A (the stapler dialog box will open)
- 1.2.1.2.2.5. Select Open
- 1.2.1.2.2.6. Select Advanced Button
- 1.2.1.2.2.7. Select 96 from the resolution image drop down
- 1.2.1.2.2.8. Select OK
- 1.2.1.2.2.9. Add a file name to the One Output File field
- 1.2.1.2.2.10. Select Staple
- 1.2.1.2.3. Combine Scanned Drawings with PDF Printed Files from CAD Program
 - 1.2.1.2.3.1. Open all files
 - 1.2.1.2.3.2. Click Add Open Files
 - 1.2.1.2.3.3. Highlight a file and use the up and down arrows to reorganize as needed
 - 1.2.1.2.3.4. Click Okay
 - 1.2.1.2.3.5. If further reorganization is needed use the thumbnail tab
 - 1.2.1.2.3.6. Click and drag page to move, shift click for multiple files
- 1.2.2. Format Drawings
 - 1.2.2.1. Provide sheet count on the sheet index and verify it matches Bluebeam sheet count
 - 1.2.2.2. Provide blank area for a 2.3 inch wide by 1.5 inch tall DSA Identification Stamp as shown below

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1.2.2.2.1. All Drawing Submittals including Pre-Checked Drawings



1.2.2.2.2. Additional Blank Area for Pre-Checked Drawings



1.2.2.3. Export documents to PDF format per Appendix D – PDF Creation Guidelines

1.2.2.3.1. Submittal needs to be combined in a single PDF that is 1 GB max

1.2.2.3.2. If size exceeds 1 GB, the submittal shall be broken up into volumes

1.2.2.4. Open PDF file in Bluebeam

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- 1.2.2.5. Create bookmarks
 - 1.2.2.5.1. Review native file
 - 1.2.2.5.1.1. Click the Audit Bookmarks icon to confirm no broken bookmarks are found
 - 1.2.2.5.1.2. Confirm all sheet numbers and sheet labels are correct
 - 1.2.2.5.1.3. If everything has loaded correctly, continue to step 1.2.2.6.
 - 1.2.2.5.1.4. If anything has loaded incorrectly, delete previous bookmarks and continue to step 1.2.2.5.2.
 - 1.2.2.5.2. Zoom into area on the document containing information for bookmark
 - 1.2.2.5.3. Go to Bookmarks Tab
 - 1.2.2.5.4. Create Bookmarks
 - 1.2.2.5.5. Page Range > Select All Pages
 - 1.2.2.5.6. Page Region > Click Select
 - 1.2.2.5.7. Select region one of bookmark – Sheet Number
 - 1.2.2.5.7.1. Example: G0001
 - 1.2.2.5.7.2. Click Add to select a second region for bookmark
 - 1.2.2.5.8. Select second region of bookmark – Sheet Title
 - 1.2.2.5.8.1. Example: COVER SHEET AND INDEX OF DRAWINGS
 - 1.2.2.5.8.2. Example: G0001 COVER SHEET AND INDEX OF DRAWINGS
 - 1.2.2.5.9. Click okay > Bookmarks will generate
 - 1.2.2.5.10. Review bookmark label generation – sheet number and sheet name have been captured properly
 - 1.2.2.5.11. If incorrect, double left click and change the title of the bookmark in question
 - 1.2.2.5.12. Click the Audit Bookmarks icon to confirm no broken bookmarks are found
 - 1.2.2.5.13. If broken bookmarks are found, repeat all steps in Section 1.2.2.5.4 and edit the page range in step 1.2.2.5.5 to include just the pages in question

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- 1.2.2.6. Thumbnail Page Labels
 - 1.2.2.6.1. Go to Thumbnail Tab
 - 1.2.2.6.2. Click Create Page Labels > Click Okay
 - 1.2.2.6.3. Page Labels will appear on Thumbnails
- 1.2.2.7. Nesting Bookmarks
 - 1.2.2.7.1. After generating thumbnail page labels
 - 1.2.2.7.2. Go to Bookmarks Tab
 - 1.2.2.7.3. Select the first sheet in each section
 - 1.2.2.7.4. Right click on first bookmark label from nesting group > Click Add > Click Add Before
 - 1.2.2.7.5. Name new bookmark by section
 - 1.2.2.7.6. Example: Structural
 - 1.2.2.7.7. Select all “S” sheets and nest by pulling the documents over to right under Structural
 - 1.2.2.7.8. Repeat for all disciplines
- 1.2.2.8. Flatten Existing Markups
 - 1.2.2.8.1. Go to Document > Flatten
 - 1.2.2.8.1.1. Click Check All
 - 1.2.2.8.1.2. Verify “Allow Markup Recovery Unflatten” is unchecked
 - 1.2.2.8.1.3. Select Flatten
- 1.2.2.9. Remove Layers
 - 1.2.2.9.1. Go to Layer Tab
 - 1.2.2.9.2. Select layers listed
 - 1.2.2.9.2.1. To select all quickly, select the top layer of the list, hold the shift key and select the bottom layer simultaneously
 - 1.2.2.9.3. Click Delete Layer
 - 1.2.2.9.4. Uncheck all options
 - 1.2.2.9.5. Click Delete
- 1.2.2.10. Hyperlink Documents (Bluebeam eXtreme Required)
 - 1.2.2.10.1. Go to File > Batch > Link > New
 - 1.2.2.10.2. Select “Add Open Files”
 - 1.2.2.10.3. Uncheck all non DWG_V# files
 - 1.2.2.10.4. Click Next
 - 1.2.2.10.5. Select Settings
 - 1.2.2.10.5.1. Select Filter Mode: “First from start”

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- 1.2.2.10.5.2. Select Filter Character: "Space"
- 1.2.2.10.5.3. Click Okay
- 1.2.2.10.6. Select Page Label
- 1.2.2.10.7. Then click "Generate"
- 1.2.2.10.8. Click "Run" to create hyperlinks
- 1.2.2.10.9. Click Finish and Close
- 1.2.2.10.10. Save Documents
- 1.2.2.11. Reference Drawings – All reference drawings shall be submitted as separate supporting documents per section 1.2.5
- 1.2.3. Format PDF Specification files (if applicable)
 - 1.2.3.1. Specifications shall be combined to a single PDF
 - 1.2.3.2. Flatten Existing Markups
 - 1.2.3.2.1. Go to Document > Flatten
 - 1.2.3.2.1.1. Click Check All
 - 1.2.3.2.1.2. Verify "Allow Markup Recovery Unflatten" is unchecked
 - 1.2.3.2.2. Select Flatten
 - 1.2.3.3. Create bookmarks

The bookmarking procedure specified below is using Bluebeam. Other methods using native software (i.e. Microsoft Word) are beyond the scope of this procedure.
 - 1.2.3.4. Bookmarks shall be for the first page of each section and be collapsible by the first page of each section
 - 1.2.3.4.1. Review native file
 - 1.2.3.4.1.1. Click the Audit Bookmarks icon to confirm no broken bookmarks are found
 - 1.2.3.4.1.2. If everything has loaded correctly, continue to step 1.2.4.
 - 1.2.3.4.1.3. If anything has loaded incorrectly, delete previous bookmarks and continue to step 1.2.3.4.2.
 - 1.2.3.4.2. Zoom into area on the document containing information for page label
 - 1.2.3.4.3. Go to Bookmarks Tab
 - 1.2.3.4.4. Create Bookmarks
 - 1.2.3.4.5. Page Range > Select Current Page
 - 1.2.3.4.6. Page Region > Click Select
 - 1.2.3.4.7. Select region of bookmark on page

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Example: 05 12 00 STRUCTURAL STEEL

- 1.2.3.4.8. Click okay > Bookmark will generate
- 1.2.3.4.9. Review bookmark label generation – spec section and name have been captured properly
- 1.2.3.4.10. If incorrect, double left click and change the title of the bookmark in question
- 1.2.3.4.11. Repeat steps 1.2.3.4.3 through 1.2.3.4.10 for the first page of each spec section
- 1.2.3.4.12. Click the Audit Bookmarks icon to confirm no broken bookmarks are found
- 1.2.3.4.13. If broken bookmarks are found, repeat all steps in Section 1.2.3.4.3 through 1.2.3.4.10.
- 1.2.3.4.14. Verify bookmarks match table of contents
 - 1.2.3.4.14.1. If bookmarks are out of order click bookmark in question drag to new location
- 1.2.4. Format PDF DSA 103 (if applicable)
 - 1.2.4.1. Flatten Existing Markups
 - 1.2.4.1.1. Go to Document > Flatten
 - 1.2.4.1.1.1. Click Check All
 - 1.2.4.1.1.2. Verify “Allow Markup Recovery Unflatten” is unchecked
 - 1.2.4.1.1.3. Select Flatten
- 1.2.5. Format PDF Supporting Documents

NOTE: Supporting documents include the additional documents required per DSA 3 Project Submittal Checklist (i.e. DSA forms, cut sheets, structural calculations, hydraulic calculations, geotechnical reports, existing drawings etc.)

 - 1.2.5.1. Bookmark the items listed in the table of contents or sheet index

NOTE: For structural calculations provide bookmarks that are broken down into its design elements. (i.e. Foundation Design shall be broken into non-shear wall footing design, sheer wall footing design, column footing design, etc.)
 - 1.2.5.2. Create bookmarks
 - 1.2.5.2.1. Review native file
 - 1.2.5.2.1.1. Click the Audit Bookmarks icon to confirm no broken bookmarks are found
 - 1.2.5.2.1.2. Confirm all sheet numbers and sheet labels are correct
 - 1.2.5.2.1.3. If everything has loaded correctly,

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continue to Section 1.2.5.3

- 1.2.5.2.1.4. If anything has loaded incorrectly, delete previous bookmarks and continue to step 1.2.5.2.2.
 - 1.2.5.2.2. Zoom into area on document containing information for bookmark
 - 1.2.5.2.3. Go to Bookmarks Tab
 - 1.2.5.2.4. Create Bookmarks
 - 1.2.5.2.5. Page Range > Select Current Page
 - 1.2.5.2.6. Page Region > Click Select
 - 1.2.5.2.7. Select region of bookmark on page
 - 1.2.5.2.7.1. Example: FOOTING DESIGN
 - 1.2.5.2.8. Click okay > Bookmarks will generate
 - 1.2.5.2.9. Review bookmark label generation – sheet number and sheet name have been captured properly
 - 1.2.5.2.10. If incorrect, double left click and change the title of the bookmark in question
 - 1.2.5.2.11. Click the Audit Bookmarks icon to confirm no broken bookmarks are found
 - 1.2.5.2.12. If broken bookmarks are found, repeat all steps in Section 1.2.5.2.3
 - 1.2.5.2.13. For documents that do not have Bluebeam readable font (i.e. scanned documents or handwritten sheet labels)
 - 1.2.5.2.13.1. Go to page requiring bookmark
 - 1.2.5.2.13.2. Click add bookmark, blue ribbon with green plus icon
 - 1.2.5.2.13.3. Enter bookmark name
 - 1.2.5.3. Flatten Existing Markups
 - 1.2.5.3.1. Go to Document > Flatten
 - 1.2.5.3.1.1. Click Check All
 - 1.2.5.3.1.2. Verify “Allow Markup Recover Unflatten” is unchecked
 - 1.2.5.3.1.3. Select Flatten
 - 1.2.5.4. Non PDF Supporting Documents – Other supporting documents shall be provided (i.e. excel files, engineering software files, etc.)

2. DOCUMENT SUBMISSIONS

All DSA reviews are now in digital format and must be submitted per the following steps in this section.

Consult table in Appendix C when naming documents.

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2.1. Submittal Documents

2.1.1. Refer to Section 1 of this document for instructions on document preparation

2.1.2. Name files with V1 Version label per the table below with .pdf file extension:

Initial Plan Review Submittal Docs with Version 1 (_V1) Identifier	Document Type	Naming Convention (For no increment)	Naming Convention with Increment (Increment 1 example shown)
	Drawings	DWG_V1	INC 01_DWG_V1
	Specifications	SPC_V1	INC 01_SPC_V1
	DSA 103	103_V1	INC 01_103_V1
	Supporting Document Type (examples shown)	Structural Calcs_V1	INC 01_Structural Calcs_V1
		Hydraulic Calcs_V1	INC 01_Hydraulic Calcs_V1
		Geotechnical Report_V1	INC 01_Geotechnical Report_V1
		DSA1_V1	INC 01_DSA1_V1
DSA1-MR_V1		INC 01_DSA1-MR_V1	
	A#_____ Existing Drawings	INC 01_A#_____ Existing Drawings	

2.1.3. Prepare all files for submittal. Refer to PR 17-03 for Project Submittal requirements

2.1.4. Upload submittal documents to the following DSABox folder location:

Note: All submittal documents shall be uploaded at the same time

BOX folder: OFFICE-APPNO

AE – AE License #

Submissions to DSA

Plan Review Phase

2.1.5. DSA will receive a Box notification that the project Files have been uploaded

2.1.6. If documents were not uploaded into DSABox, DSA will send an “Incomplete Notice” notification with instructions requiring projects to be re-registered

2.1.7. If document preparation is incomplete as described in Section 1 and/or Section 2, DSA will send an email notification of the improper preparation and request an updated resubmittal to the DSABox within a specified amount of time. If the corrected documents are not submitted within specified time then an “Incomplete Notice” with notification with instructions requiring project to be re-registered will be provided

NOTE: All subsequent document submittals will be uploaded to Bluebeam Studio Projects Submission folder and not DSABox. See Appendix A for setting up a Bluebeam Studio account.

2.1.8. Phase 1 Plan Review

2.1.8.1. DSA will verify the submittal is complete

2.1.8.1.1. If the submittal is not complete, DSA will send an email notification with instructions requiring document resubmittal

3. COMMENT INCORPORATION

3.1. Join Session and View Documents

3.1.1. Receive email notification from DSA EPR Administrator that the review is complete.

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- 3.1.1.1. The email will provide the Bluebeam Studio Session URL hyperlink.
- 3.1.1.2. Join Bluebeam Studio Session
 - 3.1.1.2.1. Click on the hyperlink to open Plan Review Session
 - 3.1.1.2.2. Bluebeam will open
 - 3.1.1.2.3. If prompted log into Bluebeam Studio
 - 3.1.1.2.4. Bluebeam Session will open
- 3.1.1.3. View Plan Review Documents
 - 3.1.1.3.1. Click Studio tab
 - 3.1.1.3.2. Under documents select document for comment review

3.2. Incorporate Comments

- 3.2.1. To incorporate DSA comments

Note: All DSA comments shall be incorporated prior to back check. Any questions and/or points of disagreement with plan review comments must be resolved with the plan reviewer prior to back check.

- 3.2.1.1. View comments in Markup list located on the bottom of the Bluebeam Studio Session
- 3.2.1.2. Filter comments based on individual DSA Plan Reviewer (as required)
 - 3.2.1.2.1. Go to Bluebeam Studio tab
 - 3.2.1.2.2. Click Session
 - 3.2.1.2.3. Select session containing documents for review
 - 3.2.1.2.4. Under Attendees right click on DSA plan reviewer name and select Filter Mark-ups
- 3.2.1.3. Incorporate comments into documents
 - 3.2.1.3.1. In Bluebeam Studio Session select each comment
 - 3.2.1.3.2. Double left click on status column
 - 3.2.1.3.3. Select INCORPORATE from DSA Back Check status menu (Incorporating comments turns red mark-up to green). If the comment is inadvertently incorporated, the comment can be changed to OPEN until ready to be changed to INCORPORATE
 - 3.2.1.3.4. To provide a response to the DSA comment, use the green reply arrow at top of markup list and type a response in the open text box
 - 3.2.1.3.5. Verify all comments have been incorporated
 - 3.2.1.3.5.1. Expand mark-up list
 - 3.2.1.3.5.2. Select Color; if red comments occur select comment and INCORPORATE.

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3.2.1.4. While in the Bluebeam Studio Session ensure online connectivity. Under the Studio tab confirm that the plug icon is green and connected

4. DSA BACK CHECK

4.1. Is Resubmittal Required?

4.1.1. If plan review indicates resubmittal is required see Section 4.2.

Note this is only required if one of the plan reviewers has placed a comment on the cover page of the drawings indicating re-submittal is required.

4.1.2. If plan review does not indicate resubmittal is required see Section 4.3.

4.2. Resubmittal Back Check

4.2.1. Incorporated comments (per Section 3.2) are required prior to resubmittal for all disciplines

Note: All DSA red comments shall be INCORPORATED (changed to green) prior to re-submittal. Any questions and/or points of disagreement with plan review comments must be resolved with the plan reviewer prior to re-submittal.

4.2.2. Prepare documents per Section 1, provide the entire document, do not submit the corrected sheets only

4.2.3. Name the files using the appropriate version control from the table below with .pdf file extension:

	Document Type	Naming Convention (For no increment)	Naming Convention with Increment (Increment 1 example shown)
Resubmitted Plan Review Docs with Version 2* (_V2*) Identifier	Drawings	DWG_V2	INC 01_DWG_V2
	Specifications	SPC_V2	INC 01_SPC_V2
	DSA 103	103_V2	INC 01_103_V2
	Supporting Document Type (examples shown)	Structural Calcs_V2	INC 01_Structural Calcs_V2
		Hydraulic Calcs_V2	INC 01_Hydraulic Calcs_V2
		Geotechnical Report_V2	INC 01_Geotechnical Report_V2
		DSA1_V2	INC 01_DSA1_V2
DSA1-MR_V2	INC 01_DSA1-MR_V2		
A#_____ Existing Drawings	INC 01_A#_____ Existing Drawings		

*All documents submitted after the initial submittal must have sequential version numbers

4.2.4. Upload File to Bluebeam Studio Project

4.2.4.1. Join Bluebeam Studio Project

4.2.4.1.1. Open Bluebeam Software

4.2.4.1.2. Connect to Bluebeam Studio

4.2.4.1.3. Under Studio tab select join

4.2.4.1.4. Enter the (9) digit Bluebeam Project ID

Note: This number is different than the Session ID and can be found in the email noted in Section 3.1.1

4.2.4.1.5. Click Okay

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- 4.2.4.1.6. Double left click on parent folders to expand to Plan Review Documents folder

OFFICE_APPNO INC# PROJECT NAME
Increment Number
A. Submission
1. Plan Review Documents

(For full Bluebeam Project Folder content and description see table in Appendix A Section 3)

- 4.2.4.1.7. Right Click on Plan Review Documents folder
- 4.2.4.1.8. Select “Upload Files”
- 4.2.4.1.9. Select Files (Hold Ctrl or Shift to select multiple files)
- 4.2.4.1.10. Select Okay
- 4.2.5. Notify Plan Reviewer that a new submittal has been made to Bluebeam Studio Project
- 4.2.6. Prior to reviewing the re-submittal the DSA Plan Reviewer will confirm the document preparation is sufficient
 - 4.2.6.1. If document preparation is incomplete, DSA will request an updated resubmittal to the Plan Review Documents folder within a specified amount of time.
 - 4.2.6.2. If preparation is sufficient, DSA Plan Reviewer will add the submittal documents to the Plan Review Session and proceed with back check review
- 4.2.7. Prior to reviewing the re-submittal the DSA Plan Reviewer will verify all DSA red comments have been INCORPORATED (changed to green) and an updated submittal provided (as required)
 - 4.2.7.1. If all DSA red comments have not been INCORPORATED, DSA will request comments to be INCORPORATED (changed to green) and an updated submittal provided (as required)
 - 4.2.7.2. If all DSA red comments have been INCORPORATED (changed to green), DSA Plan Reviewer will review all DSA comments and verify they have been properly INCORPORATED
 - 4.2.7.2.1. If comment has been properly corrected the Plan Reviewer will change the comment status to CLOSE
 - 4.2.7.2.2. If a comment has not been properly corrected the Plan Reviewer will change the comment status to OPEN
- 4.2.8. Once the resubmittal review is completed by the Plan Reviewers, DSA will send an email notification to the Design Professional
- 4.2.9. Viewing “OPEN” items on Session Documents (if applicable)
 - 4.2.9.1. Expand Markup List (located at the bottom of the Bluebeam interface)
 - 4.2.9.2. Click Filter button (Funnel Icon)

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- 4.2.9.3. Go to drop down arrow in Status Column
- 4.2.9.4. Select "OPEN"
- 4.2.9.5. Review "OPEN" items
- 4.2.10. If resubmittal is required, return to Steps 4.2.1.
- 4.2.11. If no resubmittal is required, schedule in person back check appointment per section 4.3

4.3. In Person Back Check

- 4.3.1. Call DSA Lead Plan Reviewer, contact information is found on the DSA_PR Tracking Table session document, to schedule back check appointment
- 4.3.2. Incorporated comments (per Section 3.2) are required for all disciplines prior to back check

 Note: All DSA comments shall be incorporated prior to back check. Any questions and/or points of disagreement with plan review comments must be resolved with the plan reviewer prior to back check.
- 4.3.3. Prepare documents per Section 1. Provide the entire document; do not submit the corrected sheets only
- 4.3.4. Name the files using the appropriate version control from the table below with .pdf file extension:

	Document Type	Naming Convention (For no increment)	Naming Convention with Increment (Increment 1 example shown)
Resubmitted Plan Review Docs with Version 2* (_V2*) Identifier	Drawings	DWG_V2	INC 01_DWG_V2
	Specifications	SPC_V2	INC 01_SPC_V2
	DSA 103	103_V2	INC 01_103_V2
Resubmitted Plan Review Docs with Version 2* (_V2*) Identifier	Supporting Document Type (examples shown)	Structural Calcs_V2	INC 01_Structural Calcs_V2
		Hydraulic Calcs_V2	INC 01_Hydraulic Calcs_V2
		Geotechnical Report_V2	INC 01_Geotechnical Report_V2
		DSA1_V2	INC 01_DSA1_V2
		DSA1-MR_V2	INC 01_DSA1-MR_V2
		A#_____ Existing Drawings	INC 01_A#_____ Existing Drawings

*All documents submitted after the initial submittal must have sequential version numbers

- 4.3.5. Prior to arriving at DSA, the Design Professional shall, upload file to Bluebeam Studio Project
 - 4.3.5.1. Join Bluebeam Studio Project
 - 4.3.5.1.1. Open Bluebeam Software
 - 4.3.5.1.2. Connect to Bluebeam Studio
 - 4.3.5.1.3. Under Studio tab select join
 - 4.3.5.1.4. Enter the (9) digit Bluebeam Project ID (this can be found in the email noted in Section 3.1.1)
 - 4.3.5.1.5. Click Okay
 - 4.3.5.1.6. Double left click on parent folders to expand to Plan Review Documents folder

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OFFICE_APPNO INC# PROJECT NAME
Increment Number
A. Submission
1. Plan Review Documents

(For full Bluebeam Project Folder content and description see table in Appendix A Section 3)

- 4.3.5.1.7. Right click on Plan Review Documents folder
- 4.3.5.1.8. Select "Upload Files"
- 4.3.5.1.9. Select Files (Hold Ctrl or Shift to select multiple files)
- 4.3.5.1.10. Select Okay
- 4.3.6. Report to DSA Regional Office for back check
 - 4.3.6.1. Check in at DSA Regional Office front desk at scheduled appointment time
 - 4.3.6.2. Obtain the assigned back check station number from the front desk
 - 4.3.6.3. Go to the assigned back check station

Note: DSA provides a computer, large dual monitors, and multi-function printer and scanner. The Design Professional will be able to log into the computer as a DSA guest and have access to Bluebeam Revu, DSABox, and the internet.
- 4.3.7. Get the documents up and ready for review on the DSA back check computer
 - 4.3.7.1. Login to the computer as the guest user, the computer user name and password is posted in the back check room
 - 4.3.7.2. Open Bluebeam Studio
 - 4.3.7.3. Login to Bluebeam Studio using your Bluebeam Studio email and password, if additional information is required, refer to Appendix B.3
 - 4.3.7.4. Access the Session for the Application Number
 - 4.3.7.4.1. Under Studio Tab select Home
 - 4.3.7.4.2. Double left click on the previous accessed Session
 - 4.3.7.5. Save updated Drawings (if any), Specifications (if any), and 103 (if any) from the Bluebeam Project Folder to the local computer
 - 4.3.7.5.1. Under Studio Tab select Home
 - 4.3.7.5.2. Double left-click on the previous accessed Project
 - 4.3.7.5.3. Double left-click on parent folders to expand to Plan Review Documents folder

OFFICE_APPNO INC# PROJECT NAME
Increment Number
A. Submission
1. Plan Review Documents

(For full Bluebeam Project Folder content and

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- description see table in Appendix A.3)
- 4.3.7.5.3.1. Right-click on file
 - 4.3.7.5.3.2. Select “Download Copy”
 - 4.3.7.5.3.3. Select “Download” Folder on the local computer
 - 4.3.7.5.3.4. Select “New Folder”
 - 4.3.7.5.3.5. Select “Open” (This step is only on the first file downloaded)
 - 4.3.7.5.3.6. Select “Save” > Select “Okay”
 - 4.3.7.5.4. Repeat previous step until Drawings (if any), Specifications (if any), and 103 (if any) are on the local computer
 - 4.3.7.5.5. Open updated Drawings (if any), Specifications (if any), and 103 (if any) from the local computer
 - 4.3.7.5.5.1. Select “Open”
 - 4.3.7.5.5.2. Select “Download” folder
 - 4.3.7.5.5.3. Select “New Folder”
 - 4.3.7.5.5.4. Select Ctrl+A to select all files
 - 4.3.7.5.5.5. Select “Open”
 - 4.3.7.6. Notify DSA Lead Plan Reviewer that documents are ready for review
 - 4.3.8. Prior to starting back-check, DSA Lead Plan Reviewer will confirm the document preparation is good
 - 4.3.8.1. If document preparation is incomplete, the Design Professional shall correct the drawings prior to continuation of back check
 - 4.3.8.2. If preparation is sufficient, DSA Lead Plan Reviewer will add the updated documents to the Session (as required) and proceed with back check
 - 4.3.9. Prior to starting back check review, the DSA Plan Reviewer will verify all DSA red comments have been INCORPORATED (changed to green)
 - 4.3.9.1. If all DSA red comments have not been INCORPORATED, the Design Professional will INCORPORATE (changed to green) all comments and an updated submittal provided (as required)
 - 4.3.9.2. If all DSA red comments have been INCORPORATED (changed to green) DSA Plan Reviewer will review all DSA comments and verify if they have been properly INCORPORATED
 - 4.3.9.2.1. If comment has been properly corrected the Plan Reviewer will change the comment status to CLOSE
 - 4.3.9.2.2. If a comment has not been properly corrected the Plan Reviewer will change the comment status to OPEN

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- 4.3.10. Viewing "OPEN" items on Session Documents (if applicable)
 - 4.3.10.1. Expand Markup List (Located at the bottom of the Bluebeam interface)
 - 4.3.10.2. Click Filter button (Funnel Icon)
 - 4.3.10.3. Go to drop down arrow in Status Column
 - 4.3.10.4. Select "OPEN"
 - 4.3.10.5. Review "OPEN" items
- 4.3.11. DSA Plan Reviewer will confirm if documents are code compliant
 - 4.3.11.1. If documents are not code compliant, there will be an opportunity to make the required changes within the Bluebeam Studio Session and the plan review will continue until code compliance is achieved
 - 4.3.11.1.1. If code compliance cannot be achieved using Bluebeam markup tools, then corrections will be made out of the Session
 - 4.3.11.1.2. Go back to step 4.3.2 to resubmit
 - 4.3.11.2. If documents are code compliant, the DSA EPR Administrator will approve and proceed with stamp out process
 - 4.3.11.2.1. Stamped documents will be placed in the Bluebeam Project Approval folder by the DSA EPR Administrator and uploaded to DSABox

4.4. Receive Notification of Approval

- 4.4.1. Receive notification from DSABox that approved documents have been uploaded

5. DEFERRED SUBMITTALS

NOTE: This procedure applies to both first time (V1) submittals and resubmittals (V2 and greater). If a resubmittal is required, then the upload of a new version shall not occur until an email is received by the Design Professional of Record from the EPR Administrator indicating that all required DSA Reviews are complete.

5.1. Prepare Submittal

- 5.1.1. Deferred Submittals shall be separated into two separate files (1) Drawings/Specifications and (2) Supporting Documents (if any), as follows:
- 5.1.2. Drawings and Specifications (if any) shall be combined into a single PDF file and prepared per Section 1, the sheet count per Section 1.2.2.1 is not required
 - 5.1.2.1. For resubmittals (V2 and greater), provide the entire document. Do not provide corrected sheets only
 - 5.1.2.2. Open all applicable files for this submittal in Bluebeam.
 - 5.1.2.2.1. Do not include previous versions
 - 5.1.2.3. Go to File Tab at the top of the Bluebeam interface
 - 5.1.2.4. Select Combine
 - 5.1.2.5. Select add open files

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- 5.1.2.6. Check the following boxes
 - 5.1.2.6.1. Include Bookmarks
 - 5.1.2.6.2. Use Filename as Page Label
 - 5.1.2.7. Click Okay
 - 5.1.3. Provide Supporting Documents (calculations, cut sheets, etc) into a single PDF file and prepared per Section 1.2.5
 - 5.1.3.1. For resubmittals (V2 and greater), provide only the Supporting Documents requested by the DSA Plan Reviewer
 - 5.1.3.2. Open all applicable files for this submittal in Bluebeam
 - 5.1.3.2.1. Do not include previous versions
 - 5.1.3.3. Go to File Tab at the top of the Bluebeam interface
 - 5.1.3.4. Select combine
 - 5.1.3.5. Select add open file
 - 5.1.3.6. Check the following boxes
 - 5.1.3.6.1. Include Bookmarks
 - 5.1.3.6.2. Use filename as Page Label
 - 5.1.3.6.3. Click Okay
- 5.2. Upload File to Bluebeam Studio Projects**
- 5.2.1. Upload file to Bluebeam Studio Project
 - 5.2.2. Join Bluebeam Studio Project
 - 5.2.2.1. Open Bluebeam Software
 - 5.2.2.2. Connect to Bluebeam Studio
 - 5.2.2.3. Under Studio tab select join
 - 5.2.2.4. Enter the (9) digit Bluebeam Project ID. This is the same number used during the Plan Review
 - 5.2.2.4.1. If the project has not participated in the Bluebeam Studio EPR process, email the DSA Regional Office to request a Bluebeam Studio Project ID number
 - Oakland – OakEPR@dgs.ca.gov
 - Sacramento – SacEPR@dgs.ca.gov
 - Los Angeles – LAEPR@dgs.ca.gov
 - San Diego – SDEPR@dgs.ca.gov
 - 5.2.2.5. Click Okay
 - 5.2.2.6. Save file to Bluebeam Projects Deferred Submittal Folder (For Bluebeam Project folder content and description see table in Appendix A Section 3)
 - 5.2.2.6.1. Select Save As
- NOTE: If Bluebeam Studio Project Folder does not show up refer to Appendix B Section 1.4

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5.2.2.6.2. For projects without increments, double click on parent folder to expand “PROJECT: OFFICE-APPNO\0 Increments\A. Submission\2. Post Approval Document\A. Deferred Submittal”

5.2.2.6.3. For projects with increments, double click on parent folder to expand “PROJECT: OFFICE-APPNO\0# Increments\A. Submission\2. Post Approval Document\A. Deferred Submittal\ Increment#”

5.2.2.7. Save file with Version Number (_V#) per table below with .pdf file extension:

Document Type	Naming Convention	Example Name (For no increment)	Naming Convention with Increment (Increment 1 example shown)
Deferred Submittals	DS_Deferred Submittal Name_V#	DS_Access Floor Systems_V1	INC 01_DS_Access Floor Systems_V1
		DS_Bleachers_V1	INC 01_DS_Bleachers_V1
		DS_Elevator Guide Rails and Support_V1	INC 01_DS_Elevator Guide Rails and Support_V1
		DS_Exterior Wall Systems_V1	INC 01_DS_Exterior Wall Systems_V1
		DS_Fire Pumps and Water Tanks_V1	INC 01_DS_Fire Pumps and Water Tanks_V1
		DS_Skylights_V1	INC 01_DS_Skylights_V1
		DS_Stage Rigging_V1	INC 01_DS_Stage Rigging_V1
		DS_Window Wall Systems or Storefronts_V1	INC 01_DS_Window Wall Systems or Storefronts_V1

5.2.2.8. For Supporting Documents, the naming convention shall be the same as above, except provide “_Supporting Document” at the end of the filename (for example, “DS_Bleacher_V1_Supporting Document”)

5.2.2.9. Click Okay

5.2.3. Close file

5.2.4. Bluebeam Notification of the upload will be provided to the DSA EPR Administrator for processing the submittal

5.3. EPR Administrator Notification

5.3.1. EPR Administrator will receive notification directly from Bluebeam of new upload and will notify Plan Reviewer to review

5.3.2. Incomplete Submittal – If the preparation is incomplete, the design professional will receive an email from the DSA EPR Administrator with instruction to resubmit the documents in accordance with Section 5

5.3.3. Submittal Rejected – If the submittal is currently being reviewed by DSA, then the Design Professional will receive an email from the DSA EPR Administrator indicating that the submittal is rejected and resubmittal per Section 5 shall not occur until all DSA review disciplines are complete

5.3.4. Submittal Disapproved – If the documents are disapproved, then the Design

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Professional of Record will receive an email notification from the DSA EPR Administrator indicating that the submittal is disapproved and all the comments have been added to Deferred Submittal Session document(s).

5.3.4.1. Incorporate Comments

5.3.4.1.1. Open Deferred Submittal Document

5.3.4.1.1.1. Open Bluebeam Software

5.3.4.1.1.2. Connect to Bluebeam Studio

5.3.4.1.1.3. Under Studio tab select join

5.3.4.1.1.4. Enter the (9) digit Bluebeam Studio Project ID from email

5.3.4.1.1.5. Click Okay

5.3.4.1.1.6. Right click on Project Name

5.3.4.1.1.7. Select Show Sessions

5.3.4.1.1.8. Click Join Deferred Submittal Session

5.3.4.1.1.9. Right click on session document and select open

5.3.4.1.2. Incorporate comments per Section 3.2

5.3.4.1.3. Return to Section 5.1 to prepare and resubmit a new version

5.3.5. Submittal Approved – If the documents are approved then the Design Professional of Record will receive a notice from DSABox that approved documents have been uploaded to the DSABox

6. REVISIONS

NOTE: This procedure applies to both first time (V1) submittals and resubmittals (V2 and greater). If a resubmittal is required, then the upload of a new Version shall not occur until an email is received by the Design Professional of Record from the EPR Administrator indicating that all required DSA Reviews are complete.

6.1. Prepare Submittal

6.1.1. Revisions shall be separated into two separate files (1) Drawings/Specifications and (2) Supporting Documents (if any), as follows:

6.1.2. Drawings and Specifications (if any) shall be combined into a single PDF file and prepared per Section 1, the sheet count per Section 1.2.2.1 is not required

6.1.2.1. For resubmittals (V2 and greater), provide the entire document. Do not provide corrected sheets only

6.1.2.2. Open all applicable files for this submittal in Bluebeam.

6.1.2.2.1. Do not include previous versions

6.1.2.3. Go to File Tab at the top of the Bluebeam interface

6.1.2.4. Select Combine

6.1.2.5. Select add open files

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- 6.1.2.6. Check the following boxes
 - 6.1.2.6.1. Include Bookmarks
 - 6.1.2.6.2. Use Filename as Page Label
 - 6.1.2.7. Click Okay
 - 6.1.3. Provide Supporting Documents (narrative, calculations, cut sheets, etc.) into a single PDF file and prepared per Section 1.2.5
 - 6.1.3.1. For resubmittals (V2 and greater), provide only the Supporting Documents requested by the DSA Plan Reviewer
 - 6.1.3.2. Open all applicable files for this submittal in Bluebeam
 - 6.1.3.2.1. Do not include previous versions
 - 6.1.3.3. Go to File Tab at the top of the Bluebeam interface
 - 6.1.3.4. Select combine
 - 6.1.3.5. Select add open file
 - 6.1.3.6. Check the following boxes
 - 6.1.3.6.1. Include Bookmarks
 - 6.1.3.6.2. Use filename as Page Label
 - 6.1.3.6.3. Click Okay
- 6.2. Upload File to Bluebeam Studio Projects**
- 6.2.1. Upload File to Bluebeam Studio Project
 - 6.2.2. Join Bluebeam Studio Project
 - 6.2.2.1. Open Bluebeam Software
 - 6.2.2.2. Connect to Bluebeam Studio
 - 6.2.2.3. Under Studio tab select join
 - 6.2.2.4. Enter the (9) digit Bluebeam Project ID, this is the same number used during the Plan Review
 - 6.2.2.4.1. If the project has not participated in the Bluebeam Studio Electronic Plan Review process, email the DSA regional Office to request a Bluebeam Studio Project ID number
 - Oakland – OakEPR@dgs.ca.gov
 - Sacramento – SacEPR@dgs.ca.gov
 - Los Angeles – LAEPR@dgs.ca.gov
 - San Diego – SDEPR@dgs.ca.gov
 - 6.2.2.5. Click Okay
 - 6.2.2.6. Save File to Bluebeam Projects Revisions Folder (For Bluebeam Project folder content and description see table in Appendix A Section 3)
 - 6.2.2.6.1. Select Save As
- NOTE: If Bluebeam Studio Project Folder does not show up refer to Appendix B Section 1.4

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6.2.2.6.2. For Projects without increments, double click on parent folder to expand “PROJECT: OFFICE-APPNO\0 Increments\A. Submission\2. Post Approval Document\B. Revisions”

6.2.2.6.3. For Projects with increments, double click on parent folder to expand “PROJECT: OFFICE-APPNO\0# Increments\A. Submission\2. Post Approval Document\B. Revisions\Increment#”

6.2.2.7. Save file with Version Number (_V#) per table below with .pdf file extension:

Document Type	Naming Convention	Example Name (For no increment)	Naming Convention with Increment (Increment 1 example shown)
Revisions	REV_##_V#	REV_01_V1	INC 01_REV_01_V1
	REV_##_V#	REV_02_V1	INC 01_REV_02_V1

6.2.2.8. For Supporting Documents, the naming convention shall be the same as above, except provide “_Supporting Document” at the end of the filename (for example, “REV_01_V1_Supporting Document”)

6.2.2.9. Click Okay

6.2.3. Close file

6.2.4. Bluebeam Notification of the upload will be provided to the DSA EPR Administrator for processing the submittal

6.3. EPR Administrator Notification

6.3.1. EPR Administrator will receive notification directly from Bluebeam of new upload and will notify Plan Reviewer to review

6.3.2. Incomplete Submittal – If the preparation is incomplete, the design professional will receive an email from the DSA EPR Administrator with instruction to resubmit the documents in accordance with Section 6

6.3.3. Submittal Rejected – If the submittal is currently being reviewed by DSA, then the Design Professional will receive an email from the DSA EPR Administrator indicating that the submittal is rejected and resubmittal per Section 6 shall not occur until all DSA review disciplines are complete

6.3.4. Submittal Disapproved – If the documents are disapproved, then the Design Professional of Record will receive an email notification from the DSA EPR Administrator indicating that the submittal is disapproved and all the comments have been added to Revisions Session document(s).

6.3.4.1. Incorporate Comments

6.3.4.1.1. Open Revision Document

6.3.4.1.1.1. Open Bluebeam Software

6.3.4.1.1.2. Connect to Bluebeam Studio

6.3.4.1.1.3. Under Studio tab select join

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- 6.3.4.1.1.4. Enter the (9) digit Bluebeam Studio Project ID from email
- 6.3.4.1.1.5. Click Okay
- 6.3.4.1.1.6. Right Click on Project Name
- 6.3.4.1.1.7. Select Show Sessions
- 6.3.4.1.1.8. Click Join Revision Session
- 6.3.4.1.1.9. Right Click on session document and select open
- 6.3.4.1.2. Incorporate comments per Section 3.2
- 6.3.4.1.3. Return to Section 6.1 to prepare and resubmit a new version
- 6.3.5. Submittal Approved – If the documents are approved then the Design Professional of Record will receive a notice from DSABox that approved documents have been uploaded to the DSABox

7. ADDENDUM

NOTE: This procedure applies to both first time (V1) submittals and resubmittals (V2 and greater). If a resubmittal is required, then the upload of a new Version shall not occur until an email is received by the Design Professional of Record from the EPR Administrator indicating that all required DSA Reviews are complete.

7.1. Prepare Submittal

- 7.1.1. Addendum shall be separated into two separate files (1) Drawings/Specifications and (2) Supporting Documents (if any), as follows:
- 7.1.2. Drawings and Specifications (if any) shall be combined into a single PDF file and prepared per Section 1, the sheet count per Section 1.2.2.1 is not required
 - 7.1.2.1. For resubmittals (V2 and greater), provide the entire document. Do not provide corrected sheets only
 - 7.1.2.2. Open all applicable files for this submittal in Bluebeam.
 - 7.1.2.2.1. Do not include previous versions
 - 7.1.2.3. Go to File Tab at the top of the Bluebeam interface
 - 7.1.2.4. Select Combine
 - 7.1.2.5. Select add open files
 - 7.1.2.6. Check the following boxes
 - 7.1.2.6.1. Include Bookmarks
 - 7.1.2.6.2. Use Filename as Page Label
 - 7.1.2.7. Click Okay
- 7.1.3. Provide Supporting Documents (narrative, calculations, cut sheets, etc.) into a single PDF file and prepared per Section 1.2.5
 - 7.1.3.1. For resubmittals (V2 and greater), provide only the Supporting Documents requested by the DSA Plan Reviewer

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- 7.1.3.2. Open all applicable files for this submittal in Bluebeam
 - 7.1.3.2.1. Do not include previous versions
- 7.1.3.3. Go to File Tab at the top of the Bluebeam interface
- 7.1.3.4. Select combine
- 7.1.3.5. Select add open file
- 7.1.3.6. Check the following boxes
 - 7.1.3.6.1. Include Bookmarks
 - 7.1.3.6.2. Use filename as Page Label
 - 7.1.3.6.3. Click Okay

7.2. Upload File to Bluebeam Studio Projects

- 7.2.1. Upload file to Bluebeam Studio Project
- 7.2.2. Join Bluebeam Studio Project
 - 7.2.2.1. Open Bluebeam Software
 - 7.2.2.2. Connect to Bluebeam Studio
 - 7.2.2.3. Under Studio tab select join
 - 7.2.2.4. Enter the (9) digit Bluebeam Project ID; this is the same number used during the Plan Review
 - 7.2.2.4.1. If the project has not participated in the Bluebeam Studio Electronic Plan Review process, email the DSA Regional Office to request a Bluebeam Studio Project ID number
 - Oakland – OakEPR@dgs.ca.gov
 - Sacramento – SacEPR@dgs.ca.gov
 - Los Angeles – LAEPR@dgs.ca.gov
 - San Diego – SDEPR@dgs.ca.gov
 - 7.2.2.5. Click Okay
 - 7.2.2.6. Save file to Bluebeam Projects Addendum Folder (For Bluebeam Project folder content and description see table in Appendix A Section 3)
 - 7.2.2.6.1. Select Save As

NOTE: If Bluebeam Studio Project Folder does not show up refer to Appendix B Section 1.4

 - 7.2.2.6.2. For projects without increments, double click on parent folder to expand “PROJECT: OFFICE-APPNO\0 Increments\A. Submission\2. Post Approval Document\C. Addendum”
 - 7.2.2.6.3. For Projects with increments, double click on parent folder to expand “PROJECT: OFFICE-APPNO\0# Increments\A. Submission\2. Post Approval Document\C. Addendum\Increment#”
 - 7.2.2.7. Save file with Version Number (_V#) per table below with .pdf

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extension:

Document Type	Naming Convention	Example Name (For no increment)	Naming Convention with Increment (Increment 1 example shown)
Addendum	ADD_##_V#	ADD_01_V1	INC 01_ADD_01_V1
	ADD_##_V#	ADD_02_V1	INC 01_ADD_02_V1

7.2.2.8. For Supporting Documents, the naming convention shall be the same as above, except provide “_Supporting Document” at the end of the filename (for example, “ADD_01_V1_Supporting Document”)

7.2.2.9. Click Okay

7.2.3. Close file

7.2.4. Bluebeam Notification of the upload will be provided to the DSA EPR Administrator for processing the submittal

7.3. EPR Administrator Notification

7.3.1. EPR Administrator will receive notification directly from Bluebeam of new upload and will notify Plan Reviewer to review

7.3.2. Incomplete Submittal – If the preparation is incomplete, the design professional will receive an email from the DSA EPR Administrator with instruction to resubmit the documents in accordance with Section 7

7.3.3. Submittal Rejected – If the submittal is currently being reviewed by DSA, then the Design Professional will receive an email from the DSA EPR Administrator indicating that the submittal is rejected and resubmittal per Section 7 shall not occur until all DSA review disciplines are complete

7.3.4. Submittal Disapproved – If the documents are disapproved, then the Design Professional of Record will receive an email notification from the DSA EPR Administrator indicating that the submittal is disapproved and all the comments have been added to Addendum Session document(s).

7.3.4.1. Incorporate Comments

7.3.4.1.1. Open Revision Document

7.3.4.1.1.1. Open Bluebeam Software

7.3.4.1.1.2. Connect to Bluebeam Studio

7.3.4.1.1.3. Under Studio tab select join

7.3.4.1.1.4. Enter the (9) digit Bluebeam Studio Project ID from email

7.3.4.1.1.5. Click Okay

7.3.4.1.1.6. Right click on Project Name

7.3.4.1.1.7. Select Show Sessions

7.3.4.1.1.8. Click Join Addendum Session

7.3.4.1.1.9. Right Click on session document and select open

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- 7.3.4.1.2. Incorporate comments per Section 3.2
- 7.3.4.1.3. Return to Section 7.1 to prepare and resubmit a new version
- 7.3.4.1.4. Submittal Approved – If the documents are approved then the Design Professional of Record will receive a notice from DSABox that approved documents have been uploaded to the DSABox

8. CONSTRUCTION CHANGE DOCUMENTS

NOTE: This procedure applies to both first time (V1) submittals and resubmittals (V2 and greater). If a resubmittal is required, then the upload of a new version shall not occur until an email is received by the Design Professional of Record from the EPR Administrator indicating that all required DSA Reviews are complete.

8.1. Prepare Submittal

- 1.1.1. Construction Change Document Submittal DSA shall be prepared as required per IR A-6. The documents shall be separated into two separate files (1) DSA140/Drawings/Specifications and (2) Supporting Documents (if any), as follows:
 - 8.1.1. DSA 140, Drawings (if any) and Specifications (if any) shall be combined into a single PDF file and prepared per Section 1, the sheet count per Section 1.2.2.1 is not required
 - 8.1.1.1. For resubmittals (V2 and greater), provide the entire document. Do not provide corrected sheets only
 - 8.1.1.2. Open all applicable files for this submittal in Bluebeam.
 - 8.1.1.2.1. Do not include previous versions
 - 8.1.1.3. Go to File Tab at the top of the Bluebeam interface
 - 8.1.1.4. Select Combine
 - 8.1.1.5. Select add open files
 - 8.1.1.6. Check the following boxes
 - 8.1.1.6.1. Include Bookmarks
 - 8.1.1.6.2. Use Filename as Page Label
 - 8.1.1.7. Click Okay
 - 8.1.2. Provide Supporting Documents (calculations, cut sheets, etc.) into a single PDF file and prepared per Section 1.2.5
 - 8.1.2.1. For resubmittals (V2 and greater), provide only the Supporting Documents requested by the DSA Plan Reviewer
 - 8.1.2.2. Open all applicable files for this submittal in Bluebeam
 - 8.1.2.2.1. Do not include previous versions
 - 8.1.2.3. Go to File Tab at the top of the Bluebeam interface
 - 8.1.2.4. Select Combine
 - 8.1.2.5. Select Add Open File

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- 8.1.2.6. Check the following boxes
 - 8.1.2.6.1. Include Bookmarks
 - 8.1.2.6.2. Use filename as Page Label
 - 8.1.2.6.3. Click Okay

8.1.3. Upload File to Bluebeam Studio Projects

8.1.4. Upload file to Bluebeam Studio Project

8.1.5. Join Bluebeam Studio Project

- 8.1.5.1. Open Bluebeam Software
- 8.1.5.2. Connect to Bluebeam Studio
- 8.1.5.3. Under Studio tab select join
- 8.1.5.4. Enter the (9) digit Bluebeam Project ID. This is the same number used during the Plan Review
 - 8.1.5.4.1. If the project has not participated in the Bluebeam Studio Electronic Plan Review process, email the DSA Regional Office to request a Bluebeam Studio Project ID number
 - Oakland – OakEPR@dgs.ca.gov
 - Sacramento – SacEPR@dgs.ca.gov
 - Los Angeles – LAEPR@dgs.ca.gov
 - San Diego – SDEPR@dgs.ca.gov

8.1.5.5. Click Okay

8.1.5.6. Save file to Bluebeam Projects Construction Change Documents Folder (For Bluebeam Project folder content and description see table in Appendix A Section 3)

8.1.5.6.1. Select Save As

NOTE: If Bluebeam Studio Project Folder does not show up refer to Appendix B Section 1.4

8.1.5.6.2. Double click on parent folder to expand “PROJECT: OFFICE-APPNO\0 Increments\A. Submission\2. Post Approval Document\D. Construction Change Documents”

8.1.5.7. Save file with Version Number (_V#) per table below with .pdf file extension:

Document Type	Naming Convention	Example Name
Construction Change Document	CCD_###_V#	CCD_001_V1
	CCD_###_V#	CCD_002_V1

8.1.5.8. For Supporting Documents, the naming convention shall be the same as above, except provide “_Supporting Document” at the end of the filename (for example, “CCD_001_V1_Supporting Document”)

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- 8.1.5.9. Click Okay
- 8.1.6. Close file
- 8.1.7. Bluebeam Notification of the upload will be provided to the DSA EPR Administrator for processing the submittal

8.2. EPR Administrator Notification

- 8.2.1. EPR Administrator will receive notification directly from Bluebeam of new upload and will notify Plan Reviewer to review
- 8.2.2. Incomplete Submittal – If the preparation is incomplete, the design professional will receive an email from the DSA EPR Administrator with instruction to resubmit the documents in accordance with Section 8
- 8.2.3. Submittal Rejected – If the submittal is currently being reviewed by DSA, then the Design Professional will receive an email from the DSA EPR Administrator indicating that the submittal is rejected and resubmittal per Section 8 shall not occur until all DSA review disciplines are complete
- 8.2.4. Submittal Disapproved – If the documents are disapproved, then the Design Professional of Record will receive an email notification from the DSA EPR Administrator indicating that the submittal is disapproved and all the comments have been added to Construction Change Documents Session document(s).
 - 8.2.4.1. Incorporate Comments
 - 8.2.4.1.1. Open Revision Document
 - 8.2.4.1.1.1. Open Bluebeam Software
 - 8.2.4.1.1.2. Connect to Bluebeam Studio
 - 8.2.4.1.1.3. Under Studio tab select join
 - 8.2.4.1.1.4. Enter the (9) digit Bluebeam Studio Project ID from email
 - 8.2.4.1.1.5. Click Okay
 - 8.2.4.1.1.6. Right click on Project Name
 - 8.2.4.1.1.7. Select Show Sessions
 - 8.2.4.1.1.8. Click Join Construction Change Documents Session
 - 8.2.4.1.1.9. Right click on session document and select open
 - 8.2.4.1.2. Incorporate comments per Section 3.2
 - 8.2.4.1.3. Return to Section 8.1 to prepare and resubmit a new version
- 8.2.5. Submittal Approved – If the documents are approved then the Design Professional of Record will receive a notice from DSABox that approved documents have been uploaded to the DSABox

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APPENDIX A:**NOMENCLATURE**

Bluebeam Studio Project	Digital space to manage project files and project review sessions.
Bluebeam Studio Session	Collaborative digital space for reviewing, commenting of documents and the closeout of comments.
Consultant Plan Reviewer	A plan reviewer hired and trained by DSA to perform document review and the back check with the design professional.
Design Professional	The design professional in responsible charge of the project, or his or her authorized representative.
DSABox	A cloud-based storage site where DSA project files are located.
DSA Point of Contact	DSA employee assigned to a consultant reviewer to complete internal DSA tasks, uploading resubmittal documents, updating eTracker completion percentages, etc.
Electronic Back Check	A paperless DSA back check performed using a computer and monitors.
EPR Administrator	A DSA EPR Administrator will set-up Bluebeam Studio Projects and Session, and will assign collaborators in DSABox, Bluebeam Studio Projects and Sessions.
Lead Plan Reviewer	The DSA plan reviewer (usually the structural reviewer) who arranges the back check with the design professional and the other plan reviewers, and notifies DSA EPR Administrator when the plan review documents are approvable. .
OTC Review	DSA offers OTC project review for eligible projects to expedite the review and approval process. DSA's OTC process is primarily intended for single-story relocatable buildings, and other simple projects, utilizing designs that have been pre-approved in accordance with DSA procedure PR 07-01: Pre-Check Approval .
Plan Review Tracking Table	A document (_PR Tracking Table.pdf) that is placed in the Plan Review Session and is used to keep track of the plan review status of each document. This document is for DSA use only.
Record Set	The documents that get approved, stamped, and uploaded to the DSABox and Bluebeam Studio Project approved folder.
Registration Administrator	The DSA Registration Administrator will monitor the initial submittals to DSABox and update eTracker after fees and submittal documents have been received by DSA.

ELECTRONIC PLAN REVIEW FOR DESIGN PROFESSIONAL OF RECORD USING BLUEBEAM 2017

SETUP OF BLUEBEAM STUDIO ACCOUNT

A1. INSTALLING BLUEBEAM

- A1.1. If you cannot procure Bluebeam Revu or eXtreme, then download the free Bluebeam software from the following link: <https://www.bluebeam.com/solutions/vu> and use the View Mode in Revu 2018

Note: Bluebeam eXtreme is necessary to prepare the PDF documents, see section 1.2 for additional information

A2. SETUP BLUEBEAM STUDIO ACCOUNT

- A2.1.1. First Time User – Section A2.2 – Setup with New Account
A2.1.2. Previous Bluebeam User – Section A2.3 – Setup/Verify Existing Account

A2.2. Setup with New Account

- A2.2.1. Open Bluebeam Studio Software
A2.2.2. Window will appear (If it does not go to Appendix B)
 A2.2.2.1. Click Create New
 A2.2.2.2. Click Agree
A2.2.3. Change user name to (First Last, Company)
A2.2.4. Add your email
 A2.2.4.1. Example: John Doe, ABC Company
A2.2.5. Create a password (must include: upper case, lower case, # and special character)
A2.2.6. Check Remember Password
A2.2.7. Click Okay
A2.2.8. You have now created your Bluebeam Studio account
 A2.2.8.1. If you receive an error message please see Appendix B
A2.2.9. Open Welcome email from Bluebeam Studio
 A2.2.9.1. Click Validate Email
 A2.2.9.2. Return to Bluebeam
A2.2.10. Go to Settings (upper right) > Click Preferences
A2.2.11. Click on Markup > Check Autosize Text Box and Callout Markups
A2.2.12. Go to General
 A2.2.12.1. Confirm name in user box (First Last, Company)
 A2.2.12.2. Click OK
A2.2.13. Proceed to Section 3.

A2.3. Setup/Verify Existing Account

- A2.3.1. Open Bluebeam Studio Software
A2.3.2. Go to Settings (upper right) > Click Preferences

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- A2.3.3. Go to Studio
 - A2.3.3.1. Click Login
- A2.3.4. Enter Email and Password
 - A2.3.4.1. Check Remember Password
 - A2.3.4.2. Click OK
- A2.3.5. Click Manage Servers
- A2.3.6. Double left click email address
- A2.3.7. Check name for proper naming convention
 - A2.3.7.1. First Last, Company
Example: Jaclyn Duran, AECOM
 - A2.3.7.2. Click OK
 - A2.3.7.3. Click Close
- A2.3.8. If incorrect go to Appendix B Section 1.3
- A2.3.9. Click on Markup > Check Autosize Text Box and Callout Markups
- A2.3.10. Go to General
 - A2.3.10.1. Confirm Name in user box (First Last, Company)
 - A2.3.10.2. Click Okay
- A2.3.11. Proceed to Section 3.

A3. DEMO BLUEBEAM STUDIO PROJECT/SESSION

(NOTE: The following procedure is a one-time process)

- A3.1.1. Join Bluebeam Studio Project
 - A3.1.1.1. Click Join
 - A3.1.1.2. Enter Bluebeam Studio Project ID Number: **543-932-143**
 - A3.1.1.3. Bluebeam Studio Project Folder structure contains the following; to expand collapsed folders double left click on parent folder

Bluebeam Project Folders	Description
Project Root – OFFICE_APPNO INC# PROJECT NAME	
Increment Number	
A. Submission	This is the Bluebeam Studio Project folder where the Design Professional submits Version 2 (_V2) and greater documents
1. Plan Review Documents	
2. Post Approval Documents	
A. Deferred Submittals	
B. Revisions	
C. Addenda	
D. Construction Change Documents	

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B. DSA Review	This Bluebeam Studio Project folder is for DSA USE ONLY. The Design Professional and Consultant Reviewer (if applicable) will not see it listed in the Bluebeam Studio Project
1. Plan Review Documents	
2. Post Approval Documents	
A. Deferred Submittals	
B. Revisions	
C. Addenda	This is the Bluebeam Studio Project folder where DSA places the approved documents
D. Construction Change Documents	
C. Approval	
1. Plan Review Documents	
2. Post Approval Documents	
A. Deferred Submittals	
B. Revisions	
C. Addenda	
D. Construction Change Documents	

- A3.1.1.4. Documents will be submitted to the submission folders by the Design Professional
- A3.1.1.5. DSA Plan Reviewers will copy documents from the submission folders to the DSA Review folders.
- A3.1.1.6. Five DSA review Sessions will be set-up as needed to review submittals including the following:
 - A3.1.1.6.1. Plan Review
 - A3.1.1.6.2. Deferred Submittals
 - A3.1.1.6.3. Revisions
 - A3.1.1.6.4. Addenda
 - A3.1.1.6.5. Construction Change Documents
- A3.1.1.7. After joining the Bluebeam Studio Project there are several ways to join the Bluebeam Studio Sessions within each project
- A3.1.1.8. Open Bluebeam Software
- A3.1.1.9. Connect to Bluebeam Studio
- A3.1.1.10. Under Studio tab select Join
- A3.1.1.11. Enter Bluebeam Studio Session ID Number: **545-676-364**
- A3.1.1.12. Click Okay
- A3.1.2. Additional methods to join Bluebeam Studio Sessions
 - A3.1.2.1. Via Bluebeam Studio Project
 - A3.1.2.1.1. Right click Project name
 - A3.1.2.1.2. Select Show Sessions

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- A3.1.2.1.3. Select Session to join
- A3.1.2.2. Via Bluebeam Studio Session List
 - A3.1.2.2.1. Select session containing document for review
- A3.1.3. While in the Bluebeam Studio Session ensure online connectivity; under the Studio tab confirm that the plug icon is green and connected
- A3.1.4. Check that naming convention is correct under “Attendees”
 - A3.1.4.1. First Last, Company
- A3.1.5. Open test document listed under “Documents”
 - A3.1.5.1. DWG_V1
- A3.1.6. View Bookmarks
 - A3.1.6.1. Located under blue ribbon tab
 - A3.1.6.2. Select a Page

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APPENDIX B:

B1. TROUBLESHOOTING IN BLUEBEAM

B1.1. Creating an Account – Window with option to create account does not appear

- B1.1.1. Go to Settings > Preferences
- B1.1.2. Go to Studio > Login
- B1.1.3. Click: Create Account
- B1.1.4. Return to Section A2.3.3

B1.2. Login Errors

- B1.2.1. IF - You created new account, but email is already in use
 - B1.2.1.1. Click: OK > Cancel
 - B1.2.1.2. Login using Company email
- B1.2.2. IF - Forgot Password, but email or password provided is incorrect
 - B1.2.2.1. Enter email in login window then click: Lost Password
 - B1.2.2.2. Follow emailed instructions (Email is from Bluebeam, If it does not appear in inbox, check spam or other folders)
 - B1.2.2.3. Return to Section A2.4.4
- B1.2.3. IF - Other Errors, but the email or password provided is incorrect
 - B1.2.3.1. Confirm email and password were entered properly
 - B1.2.3.2. Click forgot password – no email received
 - B1.2.3.3. Confirm email was entered properly
 - B1.2.3.4. Check spam folder in email
 - B1.2.3.5. Account may not exist – Go to Section B1.1 to create account

B1.3. Incorrect Naming Convention

- B1.3.1. Your name in the edit server window is incorrect
 - B1.3.1.1. If it is selectable and you can edit it, do so at this time
 - B1.3.1.1.1. First Last, Company (Example: John Doe, ABC Company)
 - B1.3.1.2. If it is grayed out and cannot be selected, go to studio.bluebeam.com
 - B1.3.1.3. Login using @company.com email and Bluebeam password
 - B1.3.1.4. Go to My Profile
 - B1.3.1.4.1. Update Default Name
 - B1.3.1.4.2. First Last, Company
 - B1.3.1.4.3. Click Update Profile

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B1.3.1.5. Return to Bluebeam Software

B1.3.1.5.1. Log out

B1.3.1.5.2. Return to Section B2.4.9

B1.4. Change Bluebeam Default Save Location to Bluebeam Projects

B1.4.1. Go to the setting icon in the upper right hand corner of the Bluebeam screen

B1.4.2. Go to Preferences at the bottom of the drop down menu

B1.4.3. In the Preferences window on the left hand side bar, scroll to Studio

B1.4.4. Select Studio

B1.4.5. Uncheck the box "Toolbar Integration Only"

B1.4.6. Click Okay

B1.5. Send Bluebeam Studio Support Ticket

B1.5.1. Across the top of the Bluebeam window go to Help

B1.5.2. Click Contact (Life Preserver Ring Icon)

B1.5.3. Select Technical Support

B1.5.4. Attach Log Files; window will appear

B1.5.4.1. Click Yes to send all information to Bluebeam Studio

B1.5.5. Email will open in local email application

B1.5.6. and Include a brief description of the issue and send

B2. DSA EPR PROCEDURE SUPPORT

B2.1.1. Send Email to DSAEPRSupport@dgs.ca.gov

3. BLUEBEAM STUDIO SWITCH USER ACCOUNT

Note: Switching Bluebeam Studio Users between Design Professional and Plan Reviewers maybe required on the back check computer.

B3.1.1. Go to Bluebeam Studio tab

B3.1.2. Click drop down arrow next to connectivity icon

B3.1.3. Select Switch User

B3.1.4. Enter email address and password (if password has been forgotten go to Section B1.2.2 for steps to reset password)

B3.1.5. Click Okay

ELECTRONIC PLAN REVIEW FOR DESIGN PROFESSIONAL OF RECORD USING BLUEBEAM 2017**APPENDIX C:
DOCUMENT NAMING TABLE**

	Document Type	Naming Convention (For no increment)	Naming Convention with Increment (Increment 1 example shown)
Initial Plan Review Submittal Docs with Version 1 (_V1) Identifier	Drawings	DWG_V1	INC 01_DWG_V1
	Specifications	SPC_V1	INC 01_SPC_V1
	DSA 103	103_V1	INC 01_103_V1
	Supporting Document Type (examples shown)	Structural Calcs_V1	INC 01_Structural Calcs_V1
		Hydraulic Calcs_V1	INC 01_Hydraulic Calcs_V1
		Geotechnical Report_V1	INC 01_Geotechnical Report_V1
		DSA1_V1	INC 01_DSA1_V1
		DSA1-MR_V1	INC 01_DSA1-MR_V1
	A#____ Existing Drawings	INC 01_A#____ Existing Drawings	
Additional blank pages as required by DSA	DSA Additional Comments	INC 01_DSA Additional Comments	

	Document Type	Naming Convention	Naming Convention with Increment (Increment 1 example shown)
Resubmitted Plan Review Docs with Version 2* (_V2*) Identifier	Drawings	DWG_V2	INC 01_DWG_V2
	Specifications	SPC_V2	INC 01_SPC_V2
	DSA 103	103_V2	INC 01_103_V2
	Supporting Document Type (examples shown)	Structural Calcs_V2	INC 01_Structural Calcs_V2
		Hydraulic Calcs_V2	INC 01_Hydraulic Calcs_V2
		Geotechnical Report_V2	INC 01_Geotechnical Report_V2
		DSA1_V2	INC 01_DSA1_V2
		DSA1-MR_V2	INC 01_DSA1-MR_V2
	A#____ Existing Drawings	INC 01_A#____ Existing Drawings	
Additional blank pages as required by DSA	DSA Additional Comments	INC 01_DSA Additional Comments	

*All documents submitted after the initial submittal must have sequential version numbers and the .pdf file extension

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Document Type	Naming Convention	Example Name (For no increment)	Naming Convention with Increment (Increment 1 example shown)
Deferred Submittals	DS_Deferred Submittal Name_V#	DS_Access Floor Systems_V1	INC 01_DS_Access Floor Systems_V1
		DS_Bleachers_V1	INC 01_DS_Bleachers_V1
		DS_Elevator Guide Rails and Support_V1	INC 01_DS_Elevator Guide Rails and Support_V1
		DS_Exterior Wall Systems_V1	INC 01_DS_Exterior Wall Systems_V1
	DS_Deferred Submittal Name _V#	DS_Fire Pumps and Water Tanks_V1	INC 01_DS_Fire Pumps and Water Tanks_V1
		DS_Skylights_V1	INC 01_DS_Skylights_V1
		DS_Stage Rigging_V1	INC 01_DS_Stage Rigging_V1
		DS_Window Wall Systems or Storefronts_V1	INC 01_DS_Window Wall Systems or Storefronts_V1
Revisions	REV_##_V#	REV_01_V1	INC 01_REV_01_V1
	REV_##_V#	REV_02_V1	INC 01_REV_02_V1
Addendum	ADD_##_V#	ADD_01_V1	INC 01_ADD_01_V1
	ADD_##_V#	ADD_02_V1	INC 01_ADD_02_V1
Construction Change Document	CCD_###_V#	CCD_001_V1	
	CCD_###_V#	CCD_002_V1	

*All documents submitted after the initial submittal must have sequential version numbers and the .pdf file extension

ELECTRONIC PLAN REVIEW FOR DESIGN PROFESSIONAL OF RECORD

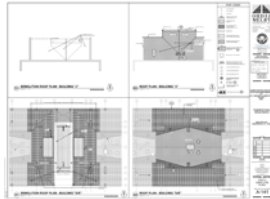
APPENDIX D:

NOTE: These guidelines are provided to help develop consistent formatting across all disciplines. Design Professionals who submit electronic documents to DSA shall follow the guidelines below during the creation of PDF documents.

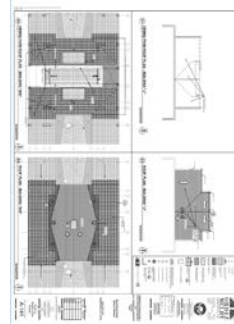
D1. PDF CREATION GUIDELINES

D1.1. Formatting

- D1.1.1. Alignment: plan drawings created in CAD program must line up when overlaid electronically.
- D1.1.2. Consistent plot location in paper space
- D1.1.3. Consistent gridline visibility across disciplines
- D1.1.4. Naming convention of structures shall be consistent across disciplines.
- D1.1.5. Sheet size and orientation of sheets shall be consistent

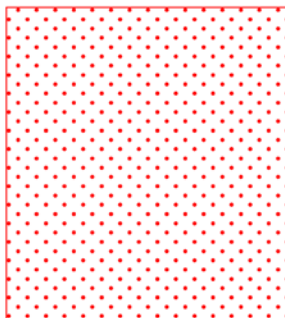


CORRECT

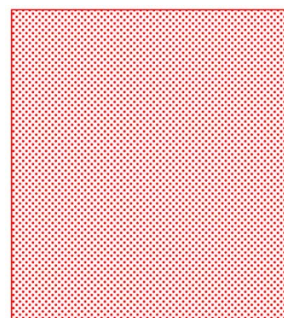


INCORRECT

- D1.1.6. All submittals should be black and white. The use of colors on PDFs shall be kept to a minimum as not to impact file size and rendering speed
 - D1.1.6.1. If colors are used, they shall not be used in a way that will impact the content of the document if printed in black and white
- D1.1.7. Minimize the use of hatch fills. If hatch fills are used then provide efficient fills (see below) to prevent slowdown rendering speed and to reduce the file size



CORRECT



INCORRECT

ELECTRONIC PLAN REVIEW FOR DESIGN PROFESSIONAL OF RECORD

D1.1.8. Use true type font to allow searchability within the PDF document

D1.2. PDF Creation

D1.2.1. PDF's shall be created directly from authoring application

D1.2.2. Use Vector based lines. No Raster and no scanned documents except when documents are not available in their native format such as PC drawings and old referenced drawings, etc. Scanned documents shall be legible and free from streaks and shall be prepared as specified per Section 1.2.1

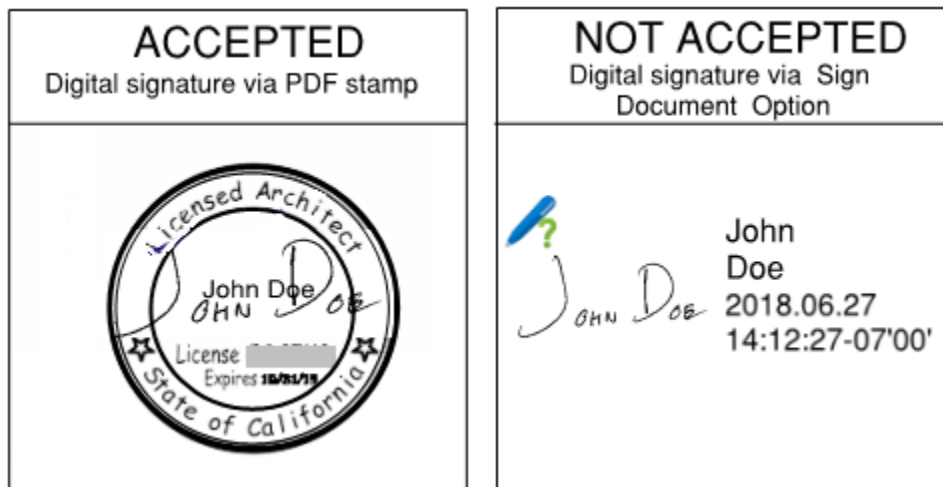
D1.2.3. Remove all unnecessary viewports.

D1.2.4. Remove all Meta Data

D1.2.5. Maintain output scale when printing to PDF. Use Print to Scale; do not use Print to Fit Page.

D1.2.6. Do not submit password protected documents or 'Restricted' documents.

D1.2.7. Do not use digital signatures via Sign Document option. See images below for clarification of what is ACCEPTED and what is NOT ACCEPTED.



A Division of the State Architect (DSA) Procedure documents a process or series of steps that DSA staff and/or external stakeholders must complete in order to fulfill one or more administrative requirements of DSA's plan and construction review programs