

PROCEDURE: ELECTRONIC PLAN REVIEW FOR CONSULTANT PLAN REVIEWER

DISCIPLINES: Structural (SS), Fire/Life Safety (FLS), Access Compliance (AC), Cal Green (CG)

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, Bluebeam Studio Projects and Sessions. This document will introduce the new digital platform for design reviews. It covers document navigation and the use of markup tools within the Bluebeam Studio Session environment. The new back check and post-approval document review steps are also outlined within.

EPR 4 Consultant Plan Reviewer

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 are submitted in PDF file format to DSAbox per [PR 18-04.BB17: Electronic Plan Review for Design Professional of Record Using Bluebeam 2017](#) or [PR 18-04.BB18: Electronic Plan Review for Design Professional of Record Using Bluebeam 2018](#). A Bluebeam EPR Administrator will then create a Bluebeam Studio Project for document control and Bluebeam Studio Sessions for collaborative design reviews per *PR 18-07: Electronic Plan Review for Registration and EPR Administrative Staff*.

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

SCOPE: The Phase 1 plan review is completed by the intake architect. Complete submittals are moved to Phase 2 and reviewed by the Plan Reviewers in a Bluebeam Studio Project and Session. Documents for review requiring re-submittals will be uploaded to Bluebeam Studio Project and checked for formatting by DSA. After completing reviews, the Plan Reviewers and Design Professional will complete an electronic back check in the DSA back check room to confirm code compliant documents. Lead Plan Reviewers will notify the DSA EPR Administrator of an approved set of documents for stamp out and approval to Design Professional.

ELECTRONIC PLAN REVIEW FOR CONSULTANT PLAN REVIEWER

TABLE OF CONTENTS

- 1. PROJECT REVIEW**
- 2. IN PERSON BACK CHECK AT DSA**
- 3. POST APPROVAL DOCUMENTS**

APPENDIX A

NOMENCLATURE

- A1. SETUP OF BLUEBEAM STUDIO ACCOUNT**
- A2. DEMO BLUEBEAM STUDIO PROJECT/SESSION AND TEST MARKUPS**
- A3. TOOL CHEST REFERENCE GUIDE**
- A4. PLAN REVIEW TRACKING TABLE**
- A5. RESUBMITTAL BACK CHECK**
- A6. BLUEBEAM STUDIO EMAIL NOTIFICATION SETTINGS**
- A7. BLUEBEAM STUDIO SWITCH USER ACCOUNT**

APPENDIX B

- B1. TROUBLESHOOTING IN BLUEBEAM**
- B2. DSA EPR PROCEDURE SUPPORT**

APPENDIX C

DOCUMENT NAMING TABLE

ELECTRONIC PLAN REVIEW FOR CONSULTANT PLAN REVIEWER

NOTE: Prior to participating in the Electronic Plan Review, the DSA Plan Review Consultant shall install Bluebeam 2017.0.40 and a Bluebeam Studio Account per Appendix A.

PROCEDURE:

1. PROJECT REVIEW

1.1. DSA Consultant Review

- 1.1.1. DSA Supervisor will notify the consultant reviewer of the project for review
- 1.1.2. When the Phase 1 review has been approved for completion by intake architect, the DSA Supervisor will email EPR ID code and the Bluebeam Studio Profile

1.2. Joining a Bluebeam Project and Session

- 1.2.1. Load Bluebeam Studio Profile
 - 1.2.1.1. Double click DSA Profile from email
 - 1.2.1.2. Click open
 - 1.2.1.3. Bluebeam will open and save profile

Note: This profile must be used in all DSA Bluebeam Studio Sessions
- 1.2.2. Join Bluebeam Studio Project
 - 1.2.2.1. Copy EPR ID code from the email
 - 1.2.2.2. Open Bluebeam software
 - 1.2.2.3. Connect to Bluebeam Studio
 - 1.2.2.4. Under Studio tab select join
 - 1.2.2.5. Paste the (9) digit EPR ID code from the email
 - 1.2.2.6. Click Okay
 - 1.2.2.7. Bluebeam Studio Project Folder structure contains the following. To expand collapsed view of folders double left click on the 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	

ELECTRONIC PLAN REVIEW FOR CONSULTANT PLAN REVIEWER

B. DSA Review	This Bluebeam Studio Project folder is for DSA USE ONLY the Design Professional, and the DSA Consultant Plan 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	
D. Construction Change Documents	This is the Bluebeam Studio Project folder where DSA places the approved documents
C. Approval	
1. Plan Review Documents	
2. Post Approval Documents	
A. Deferred Submittals	
B. Revisions	
C. Addenda	
D. Construction Change Documents	

- 1.2.3. Join Bluebeam Studio Session
 - 1.2.3.1. Right-click Project name
 - 1.2.3.2. Select Show Sessions
 - 1.2.3.3. Select Plan Review Session to join
- 1.2.4. Plan Review Session contains the following documents:
 - 1.2.4.1. “_PR Tracking Table” – This document is used to log review status, reviewer contact information and document review status
 - 1.2.4.2. DWG_V1 – Version 1 of the Drawings
 - 1.2.4.3. SPC_V1 – Version 1 of the Specifications (if applicable)
 - 1.2.4.4. 103_V1 – Version 1 of the DSA 103 (if applicable)
 - 1.2.4.5. DSA Additional Comments - These are blank pages that are added just in case the Plan Reviewer needs additional room to make comments
- 1.2.5. Review Session Document
 - 1.2.5.1. Right click on session document and select Open
 - 1.2.5.2. Navigate pages using page labels, bookmark tab, and hyperlinks (if any)
- 1.2.6. Making comments
 - 1.2.6.1. Use the tool chest and add comments
 - 1.2.6.1.1. See Appendix A Section 3 for tool chest reference guide
 - 1.2.6.1.2. If there is not enough space to capture the comments, contact the DSA point of Contact to request additional sheets blank to be added to the Session
 - 1.2.6.1.3. Reference Drawings – All reference drawings

ELECTRONIC PLAN REVIEW FOR CONSULTANT PLAN REVIEWER

shall be submitted as separate supporting documents per PR 18-04, if there are any reference sheets the DSA Plan Reviewer shall provide comment requiring them to remove reference sheets

- 1.2.6.2. Edit comments on the sheet
 - 1.2.6.2.1. Find the comment in the document set
 - 1.2.6.2.1.1. Double click comment
 - 1.2.6.2.1.2. Make edit
 - 1.2.6.2.2. Edit comments in markup list
 - 1.2.6.2.3. Click the Filter button to activate the filter feature. Go to any column, select down arrow and sort as desired.
 - 1.2.6.2.3.1. Example: Author
 - 1.2.6.2.4. Double click on comment text in markup list to open text edit window
 - 1.2.6.2.5. Click outside the box to close and update comment
 - 1.2.6.2.6. During review of a DWG_V1, clarify review status of each sheet
 - 1.2.6.2.6.1. Provide “Y” – If Yes there are comments on the sheet and the review of the sheet is complete
 - 1.2.6.2.6.2. Provide “N” – If there are No comments on the sheet and review of the sheet and the review of the sheet is complete
- 1.2.6.3. Filter comments based on individual Plan Reviewer (as required)
 - 1.2.6.3.1. Go to Bluebeam Studio Tab
 - 1.2.6.3.2. Click Home
 - 1.2.6.3.3. Click Session
 - 1.2.6.3.4. Select Session containing documents for review
 - 1.2.6.3.5. Under Attendees right click on Plan Reviewer name and select Filter Mark-ups
- 1.2.6.4. While in the Bluebeam Studio session ensure online connectivity. Under the Studio tab confirm that the plug icon is green and connected.
- 1.2.1. Supporting Documents (see Appendix C for Document Naming Table)
 - 1.2.1.1. Viewing Supporting Documents
 - 1.2.1.1.1. Return to Bluebeam Studio Project

ELECTRONIC PLAN REVIEW FOR CONSULTANT PLAN REVIEWER

- 1.2.1.1.2. Double left-click on Project Name
- 1.2.1.1.3. Double left-click on parent folders to open Plan Review Documents Folder #increments > B. DSA Review > 1. Plan Review (See table in Appendix A Section 2.1.5.3 for Bluebeam Project folder information)
- 1.2.1.1.4. Right-click file > Select Open
- 1.2.1.2. Marking up Supporting Documents (as required)
 - 1.2.1.2.1. Take a snapshot of section requiring markups
 - 1.2.1.2.1.1. Select Camera Icon
 - 1.2.1.2.1.2. Click the left top corner of the image and hold and drag to the bottom right corner of image
 - 1.2.1.2.2. Return to Bluebeam Studio Session document and Select Ctrl+V to paste the snapshot
 - 1.2.1.2.2.1. A snapshot can be pasted to the DSA Additional Comments document with a reference comment posted to the drawing
 - 1.2.1.2.3. Markup section as required
 - 1.2.1.2.4. Close supporting document
 - 1.2.1.2.4.1. Click the gray (X) in the document name tab
- 1.2.1.3. Add supporting Documents to Session (as required)
 - 1.2.1.3.1. This action is not available to the DSA Consultant Plan Reviewer. The DSA Consultant Plan Reviewer will contact the DSA Point of Contact to request supporting documents to be added to the Session
- 1.2.2. Update eTracker
 - 1.2.2.1. During plan review, the DSA Consultant will contact the DSA Point of Contact once a week with percent complete from 1% to 84%
 - 1.2.2.2. DSA Point of Contact will update eTracker Plan Check Worksheet percent complete
- 1.3. Completing the Submittal Review**
 - 1.3.1. After completing the review, notify the DSA Point of Contact
 - 1.3.1.1. DSA Point of Contact will update eTracker Plan Check Worksheet to 85% complete
 - 1.3.2. The DSA Point of Contact will set a meeting time at the DSA regional office for an oversight review
 - 1.3.3. The Consultant Reviewer will adjust comments per review

ELECTRONIC PLAN REVIEW FOR CONSULTANT PLAN REVIEWER

- 1.3.3.1. Verify all comments are made with the color red
 - 1.3.3.1.1. Go to Bluebeam Studio Session > Select Home > Select Plan Review Session
 - 1.3.3.1.2. Right click on your name in the Attendee list
 - 1.3.3.1.3. Select Filter Markups
 - 1.3.3.1.4. Expand Markup list (this is located at the bottom of the Bluebeam screen)
 - 1.3.3.1.5. Select Color
 - 1.3.3.1.6. Scroll markup list to verify only colors from the tool chest are being used
 - 1.3.3.1.7. If red is not used for a comment
 - 1.3.3.1.7.1. Right Click on the comment
 - 1.3.3.1.7.2. Select Properties
 - 1.3.3.1.7.3. Change color to red
- 1.3.4. Updated Plan Review Tracking Table. Right Click on Session document “_PR Tracking Table.pdf” File and Select Open (For an example “_PR Tracking Table.pdf” see Appendix A Section 4)
 - 1.3.4.1. Add Plan Review Contact Information (See Tool Chest and Appendix A Section 3.1.2 for template)
 - 1.3.4.2. Place an “X” in the 85% Plan Review/QA Finished Status field (See Tool Chest and Appendix A Section 3.2.3 pre-created “X”)
 - 1.3.4.3. List the session documents that have comments (See Tool Chest and Appendix A Section 3.1.2 for template)
 - 1.3.4.4. DSA Point of Contact will enter eTracker Plan Check Worksheet QA “Finish Date.”
- 1.3.5. Once all disciplines have been marked complete in eTracker Plan Check Worksheet, DSA EPR Administrator will invite the Design Professional of Record to the Bluebeam Studio Session to view comments.

Note: If a Supervisor/Point of Contact permits a resubmittal back check, see Appendix A Section 5. Re-submittal may be required if the project is from another office, has incomplete plans, or added scope.

2. IN PERSON BACK CHECK AT DSA

2.1. Back Check Submittal

- 2.1.1. The DSA Consultant Plan Reviewer will contact the DSA Point of Contact and arrange a back check appointment
- 2.1.2. The DSA Point of Contact will schedule the appointment at a designated back check station
- 2.1.3. Per PR 18-04 Section 4 the Design Professional of Record will do the following:

ELECTRONIC PLAN REVIEW FOR CONSULTANT PLAN REVIEWER

- 2.1.3.1. Report to the DSA Regional office at the scheduled appointment time
- 2.1.3.2. Log into DSA back room guest computer
- 2.1.3.3. Open Sessions
- 2.1.3.4. Download to local computer and open DWG_V2 (or greater) , SPC_V2 (or greater, if any) and DSA103 (or greater, if any)
- 2.1.3.5. Notify Lead Plan Reviewer the documents are ready for preparation verification.
- 2.1.4. Consultant Plan Reviewer will Log in to Bluebeam Studio Sessions and Verify if all DSA red comments have been INCORPORATED (changed to green)
 - 2.1.4.1. Switch Bluebeam Studio User Accounts per Appendix A7
 - 2.1.4.2. Under the Bluebeam Studio Tab
 - 2.1.4.2.1. Click Home
 - 2.1.4.2.2. Locate Project on Project List
 - 2.1.4.2.3. Left-click Project Name
 - 2.1.4.2.4. Right Click Project Name
 - 2.1.4.2.5. Select “Show Sessions”
 - 2.1.4.2.6. Select Plan Review Session (if the Plan Review Session does not show)
 - 2.1.4.2.6.1. Select “Cancel”
 - 2.1.4.2.6.2. Right-click Project name
 - 2.1.4.2.6.3. Select “Refresh”
 - 2.1.4.2.6.4. Select “Show Sessions”
 - 2.1.4.2.6.5. Select Session
 - 2.1.4.2.6.6. Select Join
 - 2.1.4.2.7. The Consultant Plan Reviewer will verify if all DSA red comments have been INCORPORATED (changed to green)>Expand Markup list (this is located at the bottom of the Bluebeam screen) > Select Color >Verify there is no red comments
 - 2.1.4.2.7.1. 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).

ELECTRONIC PLAN REVIEW FOR CONSULTANT PLAN REVIEWER

2.1.4.2.7.2. If all DSA red comments have been INCORPORATED (changed to green), DSA Plan Reviewer will review all DSA comments and verify if they have been properly INCORPORATED

2.1.5. DSA Point of Contact will log in to electronic back check station as a Guest User and will log into Bluebeam Studio. The DSA Point of Contact will verify document preparation and add documents to Session per DSA Internal Procedure PR 18-06 Section 3

2.2. Back Check

2.2.1. Login to Bluebeam User account using the Bluebeam Studio switch user tool; see Appendix A Section 7

2.2.2. Join Bluebeam Studio Session

2.2.2.1. Right click Project Name

2.2.2.2. Select Show Sessions

2.2.2.3. Select Join

2.2.3. Review Session Document

2.2.3.1. Right click on session document and select Open

2.2.3.2. Navigate pages using page labels, bookmark tab, and hyperlinks (if any)

2.2.4. View comments based on individual DSA Plan Reviewer (as required)

2.2.4.1. Go to Bluebeam Studio and click session button

2.2.4.2. Move mouse cursor over DSA Plan Reviewer name in the DSA Attendee field

2.2.4.2.1. Right Click

2.2.4.2.2. Select Filter Markup

2.2.4.3. To clear filter, repeat steps above

2.2.5. View all INCORPORATED/green or OPEN/red comments

2.2.5.1. Expand Markup list (this is located at the bottom of the Bluebeam screen)

2.2.5.2. Select Filter > Select Color

2.2.5.3. Select down arrow and select desired color

2.2.5.3.1. To view INCORPORATED comments, select green

2.2.5.3.2. To view OPEN comments, select red

2.2.6. Each Comment will be reviewed with the Design Professional of Record, and DSA Consultant will mark OPEN or CLOSED using DSA Back Check status menu

ELECTRONIC PLAN REVIEW FOR CONSULTANT PLAN REVIEWER

- 2.2.6.1. In Mark-Up list, double left click status area and select OPEN if comment has not been corrected on this submittal
- 2.2.6.2. In Mark-Up list, double left click on the status area and select CLOSED if the comment has been corrected on this submittal
- 2.2.6.3. If the comment requires additional DSA Review, the comment can be temporarily set to ADDITIONAL REVIEW REQUIRED. In the markup list double left click on the status area, select ADDITIONAL REVIEW REQUIRED and then change to OPEN or CLOSE after the review is complete
- 2.2.7. Use the tool chest and add comments (as required)
 - 2.2.7.1. See Appendix A Section 3 tool chest reference guide
- 2.2.8. Edit comments on the sheet
 - 2.2.8.1. Find the comment in the document set
 - 2.2.8.1.1. Double click comment
 - 2.2.8.1.2. Make edit
- 2.2.9. Edit comments in bottom markup list
 - 2.2.9.1. Click the Filter button to activate the filter feature. Go to any column, select down arrow and sort as desired.
 - 2.2.9.1.1. Example: Status
 - 2.2.9.2. Double click on comment text in markup list to open text edit window
 - 2.2.9.3. Click outside the box to close and update comment
- 2.2.10. Update Plan Review Tracking Table. Right click on Session document “_PR Tracking Table.pdf” File and Select Open (for example “_PR Tracking table, see Appendix A Section 4)
 - 2.2.10.1. Update list of session documents
 - 2.2.10.1.1. Add new documents that have been reviewed to the list
 - 2.2.10.1.2. If the current review file is approved, add “_A” to file name
 - 2.2.10.1.3. If the current review file is approved as corrected add “_As corrected” to file name
 - 2.2.10.1.4. If the current review file has no more outstanding items, provide a strikethrough the file name
- 2.2.11. If documents are not code-compliant, the Design Professional can make the required changes within the Bluebeam Studio Session, and the plan review will continue until code compliance is achieved. After the corrections are made and confirmed by the DSA Plan Reviewer, the comment shall be removed by the DSA Plan Reviewer.

ELECTRONIC PLAN REVIEW FOR CONSULTANT PLAN REVIEWER

- 2.2.11.1. If code compliance cannot be achieved using Bluebeam markup tools, then corrections will be made out of the Session, and the Design Professional will be required to resubmit the drawings. Refer back to Section 2.1
 - 2.2.12. If plans are code compliant:
 - 2.2.12.1. Update Plan Review Tracking Table
 - 2.2.12.1.1. Right Click on Session document “_PR Tracking Table.pdf” File
 - 2.2.12.1.2. Select Open
 - 2.2.12.1.3. Place and “X” in the 15% Back Check Status field
 - 2.2.12.2. For the Non-Lead Plan Reviewer Consultant reviews, the DSA Consultant will notify the DSA Point of Contact who will update eTracker Plan Check worksheet Back Check to 15% and notify the Lead Plan Reviewer
 - 2.2.12.3. For the Lead Plan Review Consultant reviews, the DSA Consultant Reviewer will notify the DSA Point of Contact who will refer to PR 18-06 Electronic Plan Review for DSA Plan Reviewer, Section 3.6 and 3.7 for finalizing the review
- 3. POST APPROVAL DOCUMENTS**

NOTE: Consultant reviews of post-approval documents are done in the DSA regional office. Refer to PR 18-06 for review standards.

ELECTRONIC PLAN REVIEW FOR CONSULTANT PLAN REVIEWER

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 on 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 Bluebeam Studio Profile	A DSA Bluebeam Studio Profile has been created for each discipline. The profile will layout the Bluebeam Studio Interface for digital design review and contains the tool chests required to complete each discipline's plan review.
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 Sessions and will assign collaborators in DSABox, Bluebeam Studio Projects, and Sessions.
Lead Plan Reviewer	The DSA plan reviewer (usually the structural plan 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 per 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.

ELECTRONIC PLAN REVIEW FOR CONSULTANT PLAN REVIEWER

A1. SETUP OF BLUEBEAM STUDIO ACCOUNT

First Time User – Section 1.1 – Setup with New Account

Previous DSA Bluebeam User – Section 1.2 – Setup/Verify Existing Account

A1.1. Setup with New Account

NOTE: The following procedure is a one-time process

A1.1.1. Open Bluebeam Studio software

A1.1.2. A window will appear; if it does not, go to Appendix B Section 1.1.

A1.1.2.1. Click Create New

A1.1.2.2. Click Agree

A1.1.3. Change username to: (First Last, Company)

First	Last	Company
-------	------	---------

A1.1.3.1. Example: Jane Smith, AECOM

A1.1.4. Add your email

A1.1.5. Create a password (Must include: upper case, lower case, # and special character)

A1.1.6. Check Remember Password

A1.1.7. Click Okay

A1.1.8. You have now created your Bluebeam Studio account

A1.1.8.1. If you receive an error message, please see Appendix B Section 1.2.

A1.1.9. Open the welcome email from Bluebeam Studio

A1.1.9.1. Click Validate Email

A1.1.9.2. Return to Bluebeam

A1.1.10. Go to Settings (upper right) > Click Preferences

A1.1.11. Click on Markup > Check Autosize Text Box and Callout Markups

A1.1.12. Go to General

A1.1.12.1. Confirm name in user box (First Last, Company)

A1.1.12.2. Click Okay

A1.1.13. Proceed to Appendix A Section 2.

A1.2. Setup/Verify Existing Account

NOTE: The following procedure is a one-time process

A1.2.1. Open Bluebeam Studio software

A1.2.2. Go to Settings (upper right) > Click Preferences

A1.2.3. Go to Studio

A1.2.3.1. Click Login

ELECTRONIC PLAN REVIEW FOR CONSULTANT PLAN REVIEWER

- A1.2.4. Enter Email and Password
 - A1.2.4.1. Check Remember Password
 - A1.2.4.2. Click Okay
- A1.2.5. Click Manage Servers
- A1.2.6. Double left click the email address
- A1.2.7. Check name for the proper naming convention; see Appendix A Section 1.1.3
 - A1.2.7.1. First Last, Company
 - A1.2.7.2. Jane Smith, AECOM
 - A1.2.7.3. Click Okay
 - A1.2.7.4. Click Close
- A1.2.8. If incorrect, go to Appendix B Section 1.3.
- A1.2.9. Click on Markup > Check Autosize Text Box and Callout Markups
- A1.2.10. Go to General
 - A1.2.10.1. Confirm Name in user box (First Last, Company)
 - A1.2.10.2. Click Okay
- A1.2.11. Proceed to Appendix A Section 2.

A2. DEMO BLUEBEAM STUDIO PROJECT/SESSION AND TEST MARKUPS

A2.1. DSA Profile

- A2.1.1. Double left click on the DSA Profile received in an email from DSA
- A2.1.2. Loads:
 - A2.1.2.1. Markup tools
 - A2.1.2.2. Custom DSA Back Check Status menu
 - A2.1.2.3. Status bars

NOTE: DSA Profile must be used in all Bluebeam Studio Sessions

- A2.1.3. Bluebeam may close, reopen
- A2.1.4. Note Location of tools; see Section 3 for tool chest reference guide
 - A2.1.4.1. The tool chests are located under the gold tool chest tab
- A2.1.5. Join Studio Project
 - A2.1.5.1. Click Join
 - A2.1.5.2. Enter Bluebeam Studio Project ID Number: **543-932-143**

ELECTRONIC PLAN REVIEW FOR CONSULTANT PLAN REVIEWER

A2.1.5.3. Bluebeam Studio Project Folder Structure contains the following. To expand the collapsed view of folders, double left click on the 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	
B. DSA Review	This Bluebeam Studio Project folder is for DSA USE ONLY; the Design Professional and the DSA Consultant Plan 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	
D. Construction Change Documents	
C. Approval	This is the Bluebeam Studio Project folder where DSA places the approved documents
1. Plan Review Documents	
2. Post Approval Documents	
A. Deferred Submittals	
B. Revisions	
C. Addenda	
D. Construction Change Documents	

A2.1.5.4. Documents will be submitted to the submission folders by the Design Professional

A2.1.5.5. DSA Plan reviewers will copy documents from the submission folders to the DSA Review folders.

A2.1.5.6. Five DSA Review Sessions will be set-up as needed to review submittals, including the following:

- A2.1.5.6.1. Plan Review
- A2.1.5.6.2. Deferred Submittals
- A2.1.5.6.3. Revisions
- A2.1.5.6.4. Addenda
- A2.1.5.6.5. Construction Change Documents

A2.1.5.7. After joining the Bluebeam Studio Project, there are several ways to join the Bluebeam Studio Sessions within each project

ELECTRONIC PLAN REVIEW FOR CONSULTANT PLAN REVIEWER

- A2.1.5.8. Open Bluebeam
- A2.1.5.9. Connect to Bluebeam Studio
- A2.1.5.10. Under Studio tab select “join.”
- A2.1.5.11. Enter Bluebeam Studio Session ID Number: **545-676-364**
- A2.1.5.12. Click Okay
- A2.1.6. Additional methods to join Bluebeam Studio Sessions
 - A2.1.6.1. Via Bluebeam Studio Project
 - A2.1.6.1.1. Right Click Project name
 - A2.1.6.1.2. Select Show Sessions
 - A2.1.6.1.3. Select Plan Review Session to join
 - A2.1.6.2. Via Bluebeam Studio Session List
 - A2.1.6.2.1. Select session containing document for review
 - A2.1.6.3. While in the Bluebeam Studio Session ensure online connectivity; under the Studio tab confirm that the plug icon is green and connected
- A2.1.7. Check that naming convention is correct under “Attendees”
 - A2.1.7.1. First Last, Company
- A2.1.8. Open test document listed under “Documents”
 - A2.1.8.1. DWG_V1
- A2.1.9. View Bookmarks
 - A2.1.9.1. Located under blue ribbon tab
 - A2.1.9.2. Select a Page
- A2.1.10. Return to Tool Chest tab
 - A2.1.10.1. Add one of each Markup to the demo drawing
 - A2.1.10.2. Click outside the text box / comment to finish
 - A2.1.10.2.1. Text Box / Callout will autosize

ELECTRONIC PLAN REVIEW FOR CONSULTANT PLAN REVIEWER





A3. TOOL CHEST REFERENCE GUIDE

A3.1. My Tools




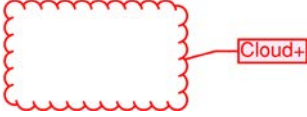


- A3.1.1. The “My Tools” tool chest allows reviewers to save frequently used comments in the DSA format
 - A3.1.1.1. Make a comment on the document for review using the DSA Discipline tool chest
 - A3.1.1.2. Right click on the comment
 - A3.1.1.3. Select add to tool chest
 - A3.1.1.4. Select my tools

A3.2. DSA Discipline Tool Chests



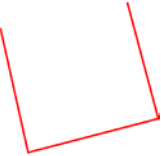


- A3.2.1. All Reviewers must use the correct color code mark ups
 - A3.2.1.1. See table below for discipline colors

Color Coded Markup	Discipline / Profile
	Structural and Phase 1 Reviewer
	Access
	Cal Green
	Fire Life Safety

- A3.2.2. Below is a table of tool chest items and how to create each item

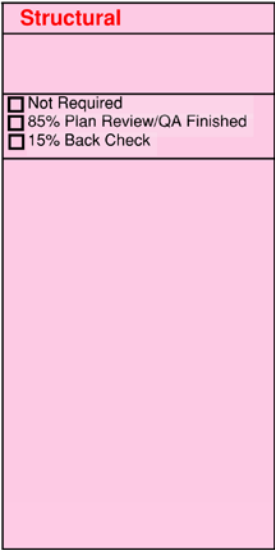

Markup Tool	Tool Use	Tool Description
	Highlight tool – Click and drag to create highlight mark	Use this tool to mark off sections that have been reviewed
	Text Box – Click to create text box, fill in with text	Create comment outlined in red on a document sheet
	Callout – First left click arrow location second click text box location. Right click callout select “Add Leader” click arrow location	Indicate an item and comment on it. Additional leaders can be used to indicate multiple of the same item
	Cloud Plus – Click, and drag to create rectangle for cloud. Pull away from cloud and click to create text box.	Outline an area for review and comment on it.
	Dimensions – Click for start point of measurement, let go, click on end point of measurement	To dimension a distance.
	Labeled Line – Click for start point of line, let go, click on endpoint of line, input label on line.	Note an area or distance of importance by adding a label line to area

ELECTRONIC PLAN REVIEW FOR CONSULTANT PLAN REVIEWER

	<p>Rectangle – Click, let go, drag to create rectangle, click to add</p>	<p>Outline an area of interest or call attention to a detail</p>
	<p>Ellipse – Click , let go, drag to create ellipse, click to add</p>	<p>Outline an area of interest or call attention to a detail</p>
	<p>Polyline – Click for start point, click to complete first segment. Click to create second, etc. To finish double left click at end point. Using shift create 45 and 90 degree angles</p>	<p>Create quick sketch lines or strike through information.</p>
	<p>Select tool and click in the bottom corner of the page under review</p>	<p>When an initial plan review of a sheet is complete this mark is placed at the bottom right corner to help identify that Yes the sheet has comments</p>
	<p>Select tool and click in the bottom corner of the page under review</p>	<p>When an initial plan review of a sheet is complete this mark is placed at the bottom right corner to help identify that No the sheet does not have comments</p>

ELECTRONIC PLAN REVIEW FOR CONSULTANT PLAN REVIEWER

A3.2.3. DSA PR Tracking Table Tool Chest

Tool Chest Item	Description of Use
	<p>PR Tracking table file will be located in the session and will be filled out with the following information per discipline:</p> <p>Plan Reviewer contact information including name, phone number and email address</p> <p>The middle box is used for marking the current status of each discipline’s review</p> <p>The bottom box will be used with the Document Review Summary template</p> <p>Additional boxes can be added by the supervisor for additional reviewers.</p> <p>(See example PR Tracking in Appendix A Section 4 for additional clarification)</p>
<p>First and Last Name 858-67X-XXXX first.last@dgs.ca.gov</p>	<p>Plan Reviewer contact information, easily paste into the PR Tracker Table</p>
<p>DWG_ SPC_ 103_</p>	<p>Document Review Summary template – add box under appropriate discipline to update and track current version under review</p>
	<p>When a consultant reviewer is participating in a review add this box for the appropriate discipline color to the PR Tracker Table and include the contact information for the Consultant Point of Contact</p>
<p style="text-align: center; font-size: 2em; color: red;">X</p>	<p>An “X” that is used to complete the status field</p>

A4. PLAN REVIEW TRACKING TABLE

- A4.1.1. During the review of a project, each reviewer will use the PR Tracking Table to catalog the documents under review
 - A4.1.1.1. Using the PR Tool Chest, Plan Reviewers will update the table with contact information, review status and reviewed documents (See Appendix A Section 3 for tool descriptions)
 - A4.1.1.1.1. Add new documents that have been reviewed to the list
 - A4.1.1.1.2. If the current review file is approved add, “_A” to file name
 - A4.1.1.1.3. If the current review file is approved as corrected add “_As corrected” to file name

ELECTRONIC PLAN REVIEW FOR CONSULTANT PLAN REVIEWER

- A4.1.1.1.4. If the current review file has no more outstanding items, provide a strikethrough the file name
 - 4.1.1.1.4.1. Double click in the Document Review Summary
 - 4.1.1.1.4.2. Highlight the text to be crossed out
 - 4.1.1.1.4.3. Go to the properties tab on the right-hand side of the Bluebeam Screen
 - 4.1.1.1.4.4. Edit text style to strikethrough
 - 4.1.1.1.4.5. Click outside the box

A4.1.2. Below is an example of how the “_PR Tracking Table.pdf” will look when a project has been completed

A4.1.3. DSA EPR Administrator will use the PR tracking table to identify the documents to be stamped out and archived

Plan Review Tracking Table (FOR DSA USE ONLY)			
	Structural	Fire Life Safety	Access
Review By:	Paul Rooney 858-675-0651 paul.rooney@dgs.ca.gov	Jared Ataiyan 858-674-5437 jared.ataiyan@dgs.ca.gov	Richard Mullen 858-674-5004 richard.mullen@dgs.ca.gov
Status: X	<input type="checkbox"/> Not Required <input checked="" type="checkbox"/> 85% Plan Review/QA Finished <input checked="" type="checkbox"/> 15% Back Check	<input type="checkbox"/> Not Required <input checked="" type="checkbox"/> 85% Plan Review/QA Finished <input checked="" type="checkbox"/> 15% Back Check	<input checked="" type="checkbox"/> Not Required <input type="checkbox"/> 85% Plan Review/QA Finished <input type="checkbox"/> 15% Back Check
Document Review Summary:	DWG_V1 SPC_V1 103_V1 DWG_V2 SPC_V2 103_V2_A DWG_V3_A SPC_V3_A	DWG_V1 SPC_V1 DWG_V2_As Corrected SPC_V2_As Corrected	

A5. RESUBMITTAL BACK CHECK

A5.1. Resubmittal of Documents

NOTE: Consultant Plan Reviewers will not be uploading resubmittal documents to Bluebeam Studio Sessions; the DSA Point of Contact will do this.

- A5.1.1. Receive notification of resubmittal from the Design Professional
- A5.1.2. Consultant Plan Reviewer will Log in to Bluebeam Studio Sessions and Verify if all DSA red comments have been INCORPORATED (changed to green)
 - A5.1.2.1. Switch Bluebeam Studio User Accounts per Appendix A7

ELECTRONIC PLAN REVIEW FOR CONSULTANT PLAN REVIEWER

- A5.1.2.2. Under the Bluebeam Studio Tab
 - A5.1.2.2.1. Click Home
 - A5.1.2.2.2. Locate Project on Project List
 - A5.1.2.2.3. Left-click Project Name
 - A5.1.2.2.4. Right Click Project Name
 - A5.1.2.2.5. Select “Show Sessions”
 - A5.1.2.2.6. Select Plan Review Session (if the Plan Review Session does not show)
 - A5.1.2.2.6.1. Select “Cancel”
 - A5.1.2.2.6.2. Right-click Project name
 - A5.1.2.2.6.3. Select “Refresh”
 - A5.1.2.2.6.4. Select “Show Sessions”
 - A5.1.2.2.6.5. Select Session
 - A5.1.2.2.6.6. Select Join
- A5.1.3. The Consultant Plan Reviewer will verify if all DSA red comments have been INCORPORATED (changed to green)>Expand Markup list (this is located at the bottom of the Bluebeam screen) > Select Color >Verify there is no red comments
 - A5.1.3.1. 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).
 - A5.1.3.2. 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
- A5.1.4. Notify the DSA Point of Contact of resubmittal and request document preparation to be verified and documents added to sessions
- A5.1.5. Receive notification from the DSA Point of Contact that resubmittal documents have been added to the Bluebeam Studio Session

A5.2. Review Resubmittal

- A5.2.1. Join Bluebeam Studio Session
 - A5.2.1.1. Right-click Project Name
 - A5.2.1.2. Select Show Sessions
 - A5.2.1.3. Select Plan Review Session to join
- A5.2.2. Review Session Document
 - A5.2.2.1. Right-click on Session document and select Open
 - A5.2.2.2. Navigate pages using page labels, bookmark tab, and hyperlinks (if any)

ELECTRONIC PLAN REVIEW FOR CONSULTANT PLAN REVIEWER

- A5.2.3. View comments based on individual DSA Plan Reviewer (as required)
 - A5.2.3.1. Go to Bluebeam Studio and click session button
 - A5.2.3.2. Move mouse cursor over DSA Plan Reviewer name in the DSA Attendee field and Right Click
 - A5.2.3.2.1. Select Filter Markup
- A5.2.4. View all INCORPORATED/green or OPEN/red comments
 - A5.2.4.1. Expand Markup list (this is located at the bottom of the Bluebeam screen)
 - A5.2.4.2. Select Filter > Select Color
 - A5.2.4.3. Select down arrow and select desired color
 - A5.2.4.3.1. To view INCORPORATED comments, select green
 - A5.2.4.3.2. To view OPEN comments, select red
- A5.2.5. Update Comment Status to OPEN or CLOSE
 - A5.2.5.1. In Mark-Up list, double left click status area and select OPEN if a comment has not been corrected on this submittal
 - A5.2.5.2. In Mark-Up list, double left click on Status Area and select CLOSED if a comment has been corrected on this submittal
 - A5.2.5.3. If a comment requires additional DSA Review, the comment can be temporarily set to ADDITIONAL REVIEW REQUIRED. In the Mark-Up list double left click on Status Area, select ADDITIONAL REVIEW REQUIRED and then change to OPEN or CLOSE after review is complete
- A5.2.6. Use the tool chest and add comments (as required)
 - A5.2.6.1. See Appendix A Section 3, tool chest use
- A5.2.7. Edit comments on sheet
 - A5.2.7.1. Find the comment in the document set
 - A5.2.7.1.1. Double click comment
 - A5.2.7.1.2. Make edit
- A5.2.8. Edit comments in Mark-Up list
 - A5.2.8.1. Click the Filter button to activate the filter feature. Go to any column, select down arrow and sort as desired.
 - A5.2.8.1.1. Example: Color
 - A5.2.8.2. Double click on comment text in Mark-Up list to open text edit window
 - A5.2.8.3. Click outside the box to close and update comment
- A5.2.9. Updated Plan Review Tracking Table. Right Click on Session document “_PR Tracking Table.pdf” File and Select Open (For an example “_PR Tracking Table.pdf” see Appendix A Section 4)
 - A5.2.9.1. Update list of session documents

ELECTRONIC PLAN REVIEW FOR CONSULTANT PLAN REVIEWER

- A5.2.9.1.1. Add new documents that have been reviewed to the list
- A5.2.9.1.2. If the current review file is approved, add “_A” to file name
- A5.2.9.1.3. If the current review file is approved as corrected, add “_As corrected” to file name
- A5.2.9.1.4. If the current review file has no more outstanding items, provide a strikethrough the file name

A5.2.10. Once the resubmittal review is complete, the reviewer will notify the Design Professional of the completed review.

A6. BLUEBEAM STUDIO EMAIL NOTIFICATION SETTINGS

A6.1. Plan Reviewer Settings

- A6.1.1. Go to the settings icon in the upper right-hand corner of the Bluebeam Screen
- A6.1.2. Go to preferences at the bottom of the drop-down menu
- A6.1.3. In the preferences window on the left-hand side bar, scroll to and select Studio
- A6.1.4. Select Notification Preferences link
- A6.1.5. Web page will open
- A6.1.6. Check “Send me an email with Markup Alerts for all Session”
- A6.1.7. Check “Send me an email when an active Project is updated”
- A6.1.8. Confirm all other Account Preference items are unchecked
- A6.1.9. Click apply
- A6.1.10. Close webpage

A7. BLUEBEAM STUDIO SWITCH USER ACCOUNT

- A7.1.1. Go to Bluebeam Studio tab
- A7.1.2. Click drop-down arrow next to connectivity icon
- A7.1.3. Select Switch User
- A7.1.4. Enter email address and password
- A7.1.5. Click Okay
- A7.1.6. Ensure proper profile for discipline
 - A7.1.6.1. Go to View
 - A7.1.6.2. Click Profile drop down
 - A7.1.6.3. Select DSA Discipline profile

ELECTRONIC PLAN REVIEW FOR CONSULTANT PLAN REVIEWER

APPENDIX B

B1. TROUBLESHOOTING IN BLUEBEAM

B1.1. Creating an Account

- B1.1.1. Open Bluebeam Software
- B1.1.2. If the window with option to create an account does not appear;
- B1.1.3. Go to Settings > Preferences
- B1.1.4. Go to Studio > Login
- B1.1.5. Click Create Account
- B1.1.6. Return to Appendix A Section 1.1.3

B1.2. Login Errors

- B1.2.1. You created a new account – Email already in use
 - B1.2.1.1. Click Okay > Cancel
 - B1.2.1.2. Login using DSA email
- B1.2.2. Forgot Password
 - B1.2.2.1. Enter email in login window then click lost password
 - B1.2.2.2. Follow emailed instructions
 - B1.2.2.3. Return to Appendix A Section 1.2
- B1.2.3. Other Errors
 - B1.2.3.1. Confirm that the email and password were entered properly
 - B1.2.3.2. Clicked “forgot password” – no email received
 - B1.2.3.2.1. Confirm email was entered properly
 - B1.2.3.2.2. Check spam folder in email
 - B1.2.3.2.3. An account may not exist – Go to Appendix B Section 1.1 to create an account

ELECTRONIC PLAN REVIEW FOR CONSULTANT PLAN REVIEWER

B1.3. Incorrect Naming Convention

- B1.3.1. Name in the edit server window is incorrect
- B1.3.2. Click Manage Servers
- B1.3.3. Double left-click the email address
- B1.3.4. Check name for the proper naming convention
 - B1.3.4.1. If it is selectable, edit it at this time
 - B1.3.4.1.1. First Last, Company
 - B1.3.4.1.2. Return to Appendix A Section 1.2.9.
 - B1.3.4.2. If it is grayed out, go to studio.bluebeam.com
 - B1.3.4.3. Log in using DSA email and Bluebeam password
 - B1.3.4.4. Go to My Profile
 - B1.3.4.4.1. Update Default Name
First Last, Company
 - B1.3.4.5. Return to Bluebeam software
 - B1.3.4.6. Log out
 - B1.3.4.7. Return to Appendix A Section 1.2.1

B1.4. Send Bluebeam Studio Support Ticket

- B1.4.1. Go to “Help” located across the top of the Bluebeam Window
- B1.4.2. Click Contact (Life Preserver Ring Icon)
- B1.4.3. Select Technical Support
- B1.4.4. Attach Log Files window will appear
 - B1.4.4.1. Click “Yes” to send all information to Bluebeam Studio
- B1.4.5. An email will open in the local email application
- B1.4.6. Include a brief description of the issue and send

B1.5. Update Bluebeam Studio Profile

- B1.5.1. DSA will email new profile
- B1.5.2. Save profile to local location
Example: Desktop
- B1.5.3. Open Bluebeam software
- B1.5.4. Across the top of the Bluebeam Window go to View
- B1.5.5. Click Profiles (Person Icon in Blue Shirt)
 - B1.5.5.1. Manage Profiles window opens
 - B1.5.5.2. Remove current profile
 - B1.5.5.2.1. Change Active profile drop down to a profile that is different than the one being removed
 - B1.5.5.2.2. Find DSA discipline from list

ELECTRONIC PLAN REVIEW FOR CONSULTANT PLAN REVIEWER

1.5.5.2.2.1. Right Click to highlight

1.5.5.2.2.2. Select Delete

B1.5.5.3. Load new profile

B1.5.5.3.1. Click Import

B1.5.5.3.2. Windows Explorer window will open

B1.5.5.3.3. Go to the location where the new profile is saved

1.5.5.3.3.1. Profile will load

B1.5.5.3.4. Change Active profile to DSA discipline

B1.5.5.3.5. Click Okay

B2. DSA EPR PROCEDURE SUPPORT

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

ELECTRONIC PLAN REVIEW FOR CONSULTANT PLAN REVIEWER

APPENDIX C

DOCUMENT NAMING TABLE

	Document Type	Naming Convention	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 a sequential version number

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.