DSA

PR 18-07

PROCEDURE: ELECTRONIC PLAN REVIEW FOR DSA ADMINISTRATIVE STAFF

Division of the State Architect (DSA) documents referenced within this publication are available on the DSA Forms or DSA Publications webpages.

PURPOSE

This procedure (PR) is one of five documents that in combination describe the process and requirements for Electronic Plan Review (EPR) of projects under DSA jurisdiction. Since October 2018, the review and approval of all project applications and post approval documents have been processed in digital format through this EPR procedure, which reduces resource consumption and aligns with the sustainability policies and goals of both the Governor's Office and the Department of General Services.

SCOPE

This PR is an internal document covering the duties of DSA administrative staff to facilitate EPR for conventional project applications. It does not cover the duties and responsibilities of DSA technical plan review staff, design professionals, or external consultant plan reviewers. Similarly, this PR does not cover project applications using the over-the-counter (OTC) process. These EPR subjects are addressed in the following PR documents:

- *PR 18-04: Electronic Plan Review for Design Professionals*
- *PR 18-05: Electronic Plan Review for Consultant Plan Reviewers*
- *PR 18-06: Electronic Plan Review for DSA Plan Review Staff*
- *PR 18-09: Electronic Plan Review for Over-the-Counter Projects*

BACKGROUND

EPR is performed on the Bluebeam Studio platform, which is a cloud-based centralized location for document storage and collaboration. Bluebeam Studio is accessed via the internet using the software application Bluebeam Revu. Bluebeam Studio consists of both Projects (file storage and management) and Sessions (collaboration), both of which can be accessed with an unlicensed version of Revu, though some aspects of the procedure require a license.

The Bluebeam Studio platform allows DSA staff and external stakeholders to share, view, and collaborate in real time in a single electronic location. Each submitted project will have a single Bluebeam Studio Project (BSP) and one or more Bluebeam Studio Sessions (BSS). DSA will generate a BSS for each plan review increment and each applicable post approval document type. This gives organization and facilitates a well-managed project from registration through certification. While various file types can be stored in BSP, the BSS only supports documents in PDF file format.

The BSS environment allows multiple users to concurrently access and mark up a common document. Different background colors are used to distinguish the markups of each plan review discipline. Throughout this PR, detailed instructions may refer to icons or buttons within the software represented by graphics. Such icons or buttons are referred to by the text that appears when hovering the cursor over the graphic.

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PROCEDURE

The instructions provided in this PR specific to the Bluebeam Revu software application are based on Version 21.6. Users with other versions of Bluebeam Revu, may find the interface to differ from that described herein.

1. PROJECT SUBMISSION

Projects due for submission will appear in the “Project Registered – Pending Initial Submittal” or “Project Registered – Pending Re-Submittal” bin of the “Registration Admin” eTracker dashboard. The registration administrator is responsible for monitoring the “Registration Admin” dashboard. Refer to *PR 17-03: Project Submittal Appointment Process* for more information on project registration requirements.

1.1 Documents and Fees Received

When the design professional (DP) uploads project documents to DSAbox in accordance with PR 18-04, the registration administrator will receive a notification email. Upon receipt of the notification email from DSAbox, the registration administrator will perform the following actions:

1.1.1 Verify fees have been received by confirming a date has been entered in the “Fee Received” field of the “Registration & Submittal Information” region on the eTracker “Application” screen, which is accessed from the “Project Submittal” tab. If fees have not been received proceed to Section 1.2 below.

1.1.2 Notify the EPR Administrator that documents have been submitted to DSAbox.

1.2 Documents or Fees Not Received

If documents are not submitted or fees are not received, the registration administrator will perform the following actions:

1.2.1 Notify the project applicant and DP of the failure to meet submission requirements per PR 17-03 Section 2.2. The project applicant is required to register for a new submission date.

1.2.2 If the submission is incomplete, check the box for “Incomplete Submittal” in the “Registration & Submittal Information” region of the eTracker “Application” screen.

1.2.3 If the submission is delayed, check the box for “Submittal Delayed” in the “Registration & Submittal Information” region of the eTracker “Application” screen.

2. DOCUMENT VERIFICATION

Registered projects that are ready for the initiation of EPR will appear in the “Project Registered – Pending Initial Submittal” or “Project Registered – Pending Re-Submittal” bin of the “Registration Admin” eTracker dashboard. The EPR Administrator will be notified when documents are submitted in accordance with Section 1.1.2 above but is also responsible for monitoring the “Registration Admin” and “EPR Admin” dashboards.

2.1 Retrieval of Submitted Documents

In accordance with PR 18-04, the DP will submit documents by uploading files to the “Plan Review Submittal” folder in DSAbox designated for this purpose. The “Plan Review Submittal” folder is located within the parent folder dedicated to the DP use (i.e., folder name containing the “AE” designator). Refer to the DSAbox External Library, Module 1, Section 1.3 for complete information on the DSAbox folder structure.

The EPR Administrator will retrieve the submitted files from DSAbox by performing the following actions:

2.1.1 Open the “Plan Review Submittal” folder in DSAbox at the location defined above.

2.1.2 Select all files uploaded by the DP for the project submission. For incremental projects do not select files previously downloaded for past increments.

2.1.2.1 If the project does not have increments or the DP has uploaded the files for each increment in separate subfolders, select the first file in the folder by clicking on its selection box on the right side of the file list. Apply keystroke "Ctrl+A" to select all files in the folder.

2.1.2.2 If the project does have increments and the DP has not provided separate subfolders, select the files for the applicable increment by clicking each individual selection box on the right side of the file list.

2.1.3 Right-click on the file icon of any of the highlighted filenames and select "Download" from the resulting context menu. DSAbox will download a ZIP file to the default folder for downloads.

2.1.4 Navigate to the default folder for downloads.

2.1.5 Right-click on the ZIP file and select "Extract All" from the resulting context menu. A dialog box titled "Extract Compressed (Zipped) Folders" will open.

2.1.6 Click the "Browse…" button. A navigation window titled "Select a destination" will open.

2.1.7 Navigate to the EPR Administrator's preferred working folder and click the "Select Folder" button. The "Select a destination" window will close.

2.1.8 Place the cursor in the "Files will be extracted to this folder:" field at the end of the path and type "\Version 1".

2.1.9 Click the "Extract" button. The "Extract Compressed (Zipped) Folders" window will close, and the files will be extracted accordingly.

2.1.10 Navigate to the EPR Administrator's preferred working folder to access the downloaded files. The folder created for the downloaded files can be moved or renamed using common Windows functions available from the resulting context menu after right-clicking on the folder.

2.2 Document Preparation Verification

After retrieving the submitted documents from DSAbox, the EPR Administrator will verify they comply with the preparation requirements of PR 18-04 Section 1.

2.2.1 The EPR Administrator will perform the following actions:

2.2.1.1 Verify the files are named in accordance with the naming convention defined in Table C2.1 below. If the filename or version is incorrect, rename accordingly.

2.2.1.2 Verify the document preparation per Checklist D1 in Appendix D below.

2.2.1.3 Validate the status menu of each document that will be added to the BSS per Checklist D2 in Appendix D below.

Note: If this step is not performed accurately, the back check cannot be completed in accordance with PR 18-04 and PR 18-06.

2.2.2 Supporting documents may be included in the project submission in file formats other than PDF (e.g., Microsoft Excel files, engineering software files, etc.). There are no specific preparation requirements for supporting documents submitted in other file formats.

2.2.3 If a submitted document is not properly prepared in accordance with this section and Appendix D below, the EPR Administrator must take the following actions:

2.2.3.1 Notify the DP by email of the inadequate document preparation, providing an itemized list of documents and deficiencies. The notification must explicitly require the DP to resubmit corrected documents within one business day.

2.2.3.2 If corrected documents are not received within two business days, notify the phase 1 plan reviewer (see Section 3.8 below) that the project is incomplete, and issue an incomplete notice per PR 18-06 Section 1.5.

2.3 Standard Administrative Notes

The EPR Administrator must apply the standard administrative notes in accordance with this section. The latest administrative notes are a standard markup in the tool set included with the DSA Bluebeam Studio Profile for EPR Administrators. Refer to Section A1 below.

2.3.1 For traditional plan review projects, the standard administrative notes will be applied to the first sheet of the DWG_V1.pdf document in a conspicuous location that does not obscure the content of the sheet.

2.3.1.1 The notes may extend in part outside of the boundary of the sheet as required.

2.3.1.2 The notes may be placed entirely outside the boundary of the sheet when the regional office establishes a standard practice of doing so consistently on all projects.

2.3.1.3 If the notes are placed on the second sheet due to space limitations on the first sheet, the EPR Administrator must add a note on the first sheet directing the DP to the notes placed on the second sheet.

2.3.2 For over-the-counter (OTC) projects, the standard administrative notes are not applied.

2.3.3 For projects that do not contain a DWG_V1 file (e.g., projects consisting of the review of a report), the standard administrative notes are not applied.

3. BLUEBEAM STUDIO ENVIRONMENT SET UP

After verifying the submitted documents, the EPR Administrator will set up the Bluebeam Studio environment in accordance with this section. The EPR Administrator will first check the “EPR ID” field on the eTracker “Application” screen. If the “EPR ID” field is blank, the EPR Administrator will proceed to Section 3.1 below, as the documents received are an initial project submission. If the “EPR ID” field contains a nine-digit number, the EPR Administrator will proceed to Section 3.5 below, as the documents received are a resubmission of a project previously deemed incomplete or are a subsequent increment of a project already in progress.

3.1 Create Bluebeam Studio Project (BSP)

The EPR Administrator will create the BSP by performing the following actions:

3.1.1 Open Bluebeam Revu and sign into Bluebeam Studio.

3.1.2 Click the “Studio” tab on the right side of the Revu interface.

3.1.3 Click the “Projects” button at the top of the tab to the right of the “Studio” title.

3.1.4 Click the "Add” button (i.e., “+” symbol) and select “New Project” from the resulting context menu. A dialog box titled “New Project” will open.

3.1.5 From the “Project Registered – Pending Initial Submittal” or “Project Registered – Pending Re-Submittal” bin of the eTracker “Registration Admin” dashboard use the cursor to highlight the “Origin ID”, “Application Number”, and “Increment” fields for the subject project and apply keystroke “Ctrl+C” to copy the project information.

3.1.6 Place the cursor in the “Name” field of the “New Project” dialog box open in Revu and apply keystroke “Ctrl+V” to paste the project information.

3.1.7 From the “Project Registered – Pending Initial Submittal” or “Project Registered – Pending Re-Submittal” bin of the eTracker “Registration Admin” dashboard use the cursor to highlight the “Name of Project” field for the subject project and apply keystroke “Ctrl+C” to copy the project name.

3.1.8 Place the cursor in the “Name” field of the “New Project” dialog box open in Revu after the text entered in Section 3.1.5 above and apply keystroke “Ctrl+V” to paste the project name.

3.1.9 The BSP name should align with the convention of the following example for a San Diego regional office project assigned application number “123456” without increments at Lincoln High School: 04 123456 0 Lincoln High School.

3.1.10 Click the “OK” button. The “New Project” dialog box will close and the new BSP will be created and open.

3.2 BSP Standard Folders

The EPR Administrator will populate the new BSP with the standard project folder structure by performing the following actions:

3.2.1 From the open BSP as described in Section 3.1.10 above (or see Section B1.1 below) click the “Upload Folder” button. A navigation window titled “Select Folder” will open.

3.2.2 Navigate to the following location: X:\Electronic Plan Review\Administrator\Bluebeam Project Template\.

3.2.3 Select the folder associated with the number of increments of the subject project (i.e., 0 increments, 2 increments, 3 increments, etc.). The total number of increments for a given project is shown in the “Project Information” region of the eTracker “Application” screen under the “Project Submittal” tab. For projects consisting of the review and approval of a report, select the “Report” folder.

3.2.4 Click the “Select Folder” button. The navigation window will close and the standard DSA folder structure per Table C1.1 below will be uploaded to the BSP.

3.3 Set BSP Permissions

The EPR Administrator must set the permissions of the new BSP by performing the following actions:

3.3.1 From the open BSP as described in Section 3.1.10 above (or see Section B1.1 below) click the “Project Settings” icon.

3.3.2 Select the “User Access” tab and uncheck the “Restrict Users” box.

3.3.3 Select the “Permissions” tab and click the green plus symbol icon. A dialog box titled “Select Groups” will open.

3.3.4 In the “Select Groups” dialog box, select “DSA Direct Employees” and click the “OK” button. The dialog box will close and “DSA Direct Employees” will be added to the “Users/Groups” field.

3.3.5 Set “Applied Permissions” for the “Attendees” and “DSA Direct Employees”, respectively in accordance with Table C3.1 below.

3.3.5.1 Select each group by clicking its name in the “Users/Groups” field.

3.3.5.2 Set each permission in sequence by clicking the entry field and then clicking the caret (i.e., “^” symbol) to activate the drop-down menu.

3.3.6 When all “Applied Permissions” have been set in accordance with Table C3.1 click the “Apply” button.

3.3.7 Select the “Folder Permissions” tab and click the green plus symbol icon. A dialog box titled “Select Groups” will open.

3.3.8 In the “Select Groups” dialog box, select “DSA Direct Employees” and click the “OK” button. The dialog box will close and “DSA Direct Employees” will be added to the “Users/Groups” field.

3.3.9 Set folder “Applied Permissions” for the “Attendees” and “DSA Direct Employees”, respectively in accordance with Table C3.2 below. Click on the caret (i.e., “^” symbol) left of “Project Root” and each folder to expand the list and show sub-folders.

3.3.9.1 Select each group by clicking its name in the “Users/Groups” field.

3.3.9.2 Set each permission in sequence by clicking the entry field and then clicking the caret (i.e., “^” symbol) to activate the drop-down menu.

3.3.10 When all “Applied Permissions” have been set in accordance with Table C3.2 below, click the “Apply” button.

3.3.11 Click the “OK” button. The “Project Settings” dialog box will close.

3.4 Update eTracker

The EPR Administrator must record the BSP identification number in eTracker by performing the following actions:

3.4.1 In Revu activate the “Studio” tab. Click the “Projects” button at the top of the tab to the right of the “Studio” title.

3.4.2 Right-click on the name of the BSP created in Section 3.1 above from the “Joined” list. Select “Copy Project ID” from the resulting context menu.

3.4.3 In eTracker, select the “Project Submittal” tab and activate the “Application” screen.

3.4.4 Place the cursor in the “EPR ID” field of the “Registration & Submittal Information” region of the “Application” screen. Apply keystroke “Ctrl+V” to paste the nine-digit BSP identification number.

3.4.5 Click the “Save” button at the bottom of the eTracker “Application” screen.

3.5 Upload Documents to BSP

The EPR Administrator will upload the submitted project documents to the new BSP by performing the following actions:

3.5.1 From the open BSP as described in Section 3.1.10 above (or see Section B1.1 below), expand the “B. DSA Review" and “1. Plan Review Documents” folders by clicking the caret (i.e., “^” symbol) left of the folder name.

3.5.1.1 For a project without increments, right-click the “1. Plan Review Documents” folder.

3.5.1.2 For projects with increments right-click the applicable increment sub-folder in the “1. Plan Review Documents” folder.

3.5.2 Select “Upload Folder” from the resulting context menu. A navigation window titled “Select Folder” will open.

3.5.3 Navigate to the EPR Administrator’s preferred working folder and select the “Version 1” folder described in Section 2.1.10 above.

3.5.4 Click the “Select Folder” button. The navigation window will close, and the “Version 1” folder will upload to BSP.

3.6 Create Bluebeam Studio Session (BSS)

The EPR Administrator will create a new BSS by performing the following actions:

3.6.1 From the open BSP as described in Section 3.1.10 (or see Section B1.1 below) expand the “B. DSA Review" and “1. Plan Review Documents” folders by clicking the caret (i.e., “^” symbol) left of the folder name.

3.6.1.1 For a project without increments, right-click on the “_PR Tracking Table.pdf” file.

3.6.1.2 For a project with increments, expand the applicable increment folder. Within the applicable increment folder right-click on the “_INC 0#_PR Tracking Table.pdf” file, where “#” represents the applicable increment number.

3.6.2 Select “Add to New Session…” from the resulting context menu. A dialog box titled “Session Name” will open.

3.6.3 Enter the new BSS name in the “Name” field as follows, where *RO* is the DSA regional office identification number (i.e., 01: Oakland, 02: Sacramento, 03: Los Angeles, 04: San Diego), *APPLNO* is the six-digit project application number, and *Project Name* matches that used in eTracker.

3.6.3.1 For a project without increments: *RO_APPLNO* Plan Review *Project Name*. For example, the plan review BSS for a San Diego regional office project assigned application number “123456” without increments at Lincoln High School would be named thus: 04_123456 Plan Review Lincoln High School.

3.6.3.2 For a project with increments: *RO_APPLNO* INC # Plan Review *Project Name*, where “#” represents the applicable increment number. For example, the plan review BSS for the second increment of a San Diego regional office project assigned application number “123456” at Lincoln High School would be named thus: 04_123456 INC 2 Plan Review Lincoln High School.

3.6.4 Click the “OK” button. The dialog box will close, and a new BSS will be created. The new BSS will open and appear on the right sidebar when both the “Studio” tab and the “Sessions” button adjacent to the “Studio” tab title are selected.

3.7 Set BSS Permissions

The EPR Administrator must set the permissions of the new BSS by performing the following actions:

3.7.1 From the open BSS as described in Section 3.6.4 above (refer to Section B1.2 below to join the BSS if needed) click the “Session Settings” icon. A dialog box titled “Session Settings” will open.

3.7.2 Select the “Attendees” tab and uncheck the “Restrict Attendees” box.

3.7.3 Select the “Permissions” tab and click the green plus symbol icon. A dialog box titled “Select Groups” will open.

3.7.4 In the “Select Groups” dialog box, select “DSA Direct Employees” and click the “OK” button. The dialog box will close and “DSA Direct Employees” will be added to the “Users/Groups” field.

3.7.5 Set “Applied Permissions” for the “Attendees” and “DSA Direct Employees”, respectively in accordance with Table C3.3 below.

3.7.5.1 Select each group by clicking its name in the “Users/Groups” field.

3.7.5.2 Set each permission in sequence by clicking the entry field and then clicking the caret (i.e., “^” symbol) to activate the drop-down menu.

3.7.6 When all “Applied Permissions” have been set in accordance with Table C3.3 below, click the “Apply” button.

3.7.7 Click the “OK” button. The “Session Settings” dialog box will close.

3.8 Initiate Phase 1 Plan Review

The EPR Administrator must perform the actions described in this section to initiate the phase 1 plan review. The phase 1 plan reviewer referenced below is commonly referred to as the “intake architect” or “intake structural engineer”.

3.8.1 Enter the applicable date in the “Documents Received” field on the eTracker “Application” screen as follows:

3.8.1.1 If all submitted documents were prepared in accordance with Section 2.2 above and Appendix D below, enter the latter of the registration date or the date the last file was uploaded.

3.8.1.2 If all originally submitted documents were not prepared in accordance with Section 2.2 above and Appendix D below, enter the date the last corrected file was received.

3.8.2 If the project submission was initially incomplete or delayed, enter the later of the “Fee Received” and “Documents Received” dates in in the “Incomplete/Delayed Project Received” field on the eTracker “Application” screen.

3.8.3 From the open BSP as described in Section 3.1.10 above (or see Section B1.1 below) right-click the BSP name and select “Invite” from the resulting context menu. A dialog box titled “Invite Users” will open.

3.8.4 Use one of the three available options to select the email address(es) of the phase 1 plan reviewer(s) as follows:

3.8.4.1 Click the “Type or Paste Emails” button to enter email addresses manually. After entering addresses click the “Check & Include Emails” button.

3.8.4.2 Click the “Add Emails from Groups” if a group has been set up for this purpose.

3.8.4.3 Click the “Use Address Book” button to select individuals from the address book of the EPR Administrator’s email account.

3.8.5 Click the “Invite Participants” button. A pop-up window will open and confirm the invitation email has been sent. Click the “OK” button. The pop-up window and dialog box will close.

4. PLAN REVIEW COMPLETION

After the plan review is finished by all review disciplines, the EPR Administrator will verify completion of the plan review in the BSS and notify the DP accordingly. Projects for which plan review is complete will appear in the “Plan Review Complete Ready to Return to Client” bin of the “EPR Admin” eTracker dashboard. The EPR Administrator is responsible for monitoring the “EPR Admin” dashboard.

4.1 Update eTracker

The EPR Administrator must update eTracker by performing the following actions:

4.1.1 Join the BSS as described in Section B1.2 below. Verify that there are no actions in the “Pending” region of the Studio tab when the “Sessions” button is selected.

4.1.2 In eTracker, click the “Select” button for the project on the “EPR Admin” dashboard.

4.1.3 Under the “Project Review” tab select the “Plan Check Worksheet” screen.

4.1.4 In the “Return for Correction Date” fields in the regions of each plan review discipline enter the date the notification email described in Section 4.2 below is sent.

4.1.5 Click the “Save” button of the eTracker “Plan Check Worksheet” screen.

4.2 Notify Design Professional (DP)

Using the standard email template established for this purpose, the EPR Administrator must notify the project applicant and DP that the plan review is complete and ready for their attention.

4.2.1 The notification email must include the following information:

4.2.1.1 Notice that the plan review is complete for all disciplines.

4.2.1.2 Notice that EPR was performed in the Bluebeam Studio environment.

4.2.1.3 Reference to PR 18-04 for the duties and responsibilities of the DP.

4.2.1.4 Nine-digit identification number of the BSP.

4.2.1.5 Link (i.e., URL) to the plan review BSS.

4.2.1.6 Contact email address for questions or access issues.

4.2.2 The notification email must be distributed to the following parties:

4.2.2.1 DP in general responsible charge as denoted on Line 23 of the form DSA 1.

4.2.2.2 School district's facilities director.

5. STAMP OUT AND ARCHIVE

After the back check is finished and the project has been approved, the EPR Administrator will verify various procedural steps have been performed, stamp and post the approval documents, and archive the project files. Projects that are approved and whose documents are ready to be stamped will appear in the "Back Check Completed Stamp Out Pending" bin of the "EPR Admin" eTracker dashboard. The EPR Administrator is responsible for monitoring the "EPR Admin" dashboard.

5.1 Verify Procedural Requirements

The EPR Administrator will verify that the required procedural steps have been completed by performing the following actions:

5.1.1 Join the BSP and BSS as described in Sections B1.1 and B1.2 below, respectively.

5.1.2 Open the "PR Tracking Table" document in the BSS and verify the following:

5.1.2.1 The Lead Plan Reviewer (LPR) has clearly identified which version of each approval document is approved and should be stamped. If the approved document versions are not clear, contact the LPR and request clear direction be given in the "PR Tracking Table" document.

5.1.2.2 The plan reviewers of each applicable review disciplines have placed an "X" in the box confirming they have moved all supporting documents that are to be retained in DSA records to the "B. DSA Review" folder. If the box of any applicable plan review discipline does not contain an "X", contact the plan reviewer and advise them that stamping of the approved documents cannot be completed until this is done.

5.1.3 Review the BSS "Record" tab and confirm no markup actions have been performed by the DP after the LPR completed final notation on the "PR Tracking Table" document. If a DP has modified a BSS document after the LPR approved the project, notify the LPR and do not proceed to Section 5.2 below until authorized to do so by the LPR.

5.2 Prepare Approved Document Files

After verifying procedural requirements have been met, the EPR Administrator will prepare the approved documents by performing the following actions:

5.2.1 Join the BSP and BSS as described in Sections B1.1 and B1.2 below, respectively.

5.2.2 Open the version of the construction drawing (i.e., DWG_V*.pdf) file that has been identified as approved through the addition of the suffix "_A" or "_AsCorrected" to the document name listed in the "PR Tracking Table".

Note: For projects consisting of the review and approval of a report only, there will not be a construction drawing file. In these cases, the steps described in this section will be performed on the report (i.e., EDCR_V*.pdf, EER_V*.pdf, or RAR_V*.pdf) file.

5.2.3 While the approved file is still in the BSS, record the quantity of markups in the "Markups List". For files with a large number of markups or markups from numerous authors, it is recommended to sort the "Markups List" by author and collapse the list. In this view the "Markups List" will summarize the number of markups made by each author in parentheses adjacent to the author's name. The Snipping Tool application can be used to take a partial screenshot of the collapsed "Markups List" summarizing the quantity of markups by author for reference in Section 5.2.7 below.

5.2.4 Click the "Save As (DMS)" icon. A BSP navigation window will open titled "Save Project File".

5.2.5 Navigate to the "C. Approval Folder".

5.2.5.1 For a project without increments, select the "1. Plan Review Documents" folder.

5.2.5.2 For projects with increments, select the sub-folder for the applicable increment within the "1. Plan Review Documents" folder.

5.2.6 Click the "OK" button to save the approved file.

Note: At the EPR administrator's discretion, the file may be first saved to the local computer and later uploaded to the BSP after completion of the actions described below.

5.2.7 Immediately after saving the file to the BSP (or local drive) and prior to performing any other action on the file, check the quantity of markups in the "Markups List". For files with a large number of markups or markups from numerous authors, the method described in Section 5.2.3 above is recommended. Compare the quantity of markups in the downloaded file to that previously recorded (e.g., that shown in the Snipping Tool application when used) from the file in the BSS as described in Section 5.2.3 above. If the quantity of markups matches those from the file in the BSS, proceed as described below. If any discrepancy is observed, discontinue the stamping process and immediately contact the LPR, the regional office EPR plan review lead, and the EPR statewide team lead.

5.2.8 Right-click the filename in the BSP folder described in Section 5.2.5 above. Select "Rename…" from the resulting context menu. A dialog box titled "Rename" will open.

5.2.9 Place the cursor in the "Name" field of the dialog box and add a prefix in the format *RO-APPLNO_*, where *RO* is the DSA regional office identification number and *APPLNO* is the six-digit project application number. Move the cursor to the end of the filename and replace the version suffix with the suffix "_A".

5.2.9.1 For example, the construction drawing file for a San Diego regional office project assigned application number "123456" without increments would be named thus:

04-123456_DWG_A

5.2.9.2 For example, the construction drawing file for the second increment of a San Diego regional office project assigned application number "123456" would be named thus:

04-123456_INC 02_DWG_A

5.2.10 Click the "OK" button. The dialog box will close, and the filename will be changed.

5.2.11 Repeat the actions in this section for the approved specification (i.e., SPC_V*.pdf) file and the approved form *DSA 103: List of Required Structural Tests and Special Inspections* (i.e., 103_V*.pdf) file as applicable.

5.3 Update DSA Identification Stamp

The EPR Administrator will update the DSA identification stamp with project-specific information by performing the following actions:

5.3.1 In Revu click the “Stamp” icon. From the resulting drop-down menu proceed per Section 5.3.1.1 below for a traditional project or per Section 5.3.1.2 below for a pre-check (PC) project. If either stamp referenced does not appear in the drop-down menu, see Section A3 below.

5.3.1.1 Hover over “1_DSA ID Stamp.pdf” and click the pencil symbol for editing located to the right of the stamp name. A new tab will open with the stamp in edit mode. Refer to Figure C5.1 below.

5.3.1.2 Hover over “3_DSA PC ID Stamp.pdf” and click the pencil symbol for editing located to the right of the stamp name. A new tab will open with the stamp in edit mode. Refer to Figure C5.2 below.

5.3.2 Place the cursor in the “APP” field and enter the project application number in the format *RO-APPLNO* where, where *RO* is the DSA regional office identification number, *APPLNO* is the six-digit project application number.

5.3.3 Place the cursor in the “INC” field and enter the increment number. If the project does not have increments, delete any entry in the “INC” field. This section does not apply to PC projects.

5.3.4 Check the box for each plan review discipline that reviewed and approved the project (i.e., “SS” for structural safety, “FLS” for fire and life safety, “ACS” for access compliance, and “CG” for sustainability) in accordance with the “PR Tracking Table” document. Verify the checked plan review discipline boxes match the boxes checked in the “Review Type” region of the eTracker “Application” screen under the “Project Submittal” tab.

5.3.5 From the “File” pull-down menu select “Save” or apply keystroke “Ctrl+S” to save the updates.

5.3.6 Click the "X" in the file name tab to close the stamp edit mode.

5.4 Stamp Approved Documents

After preparing the approved files and identification stamp, the EPR Administrator will stamp the approved documents by performing the following actions:

5.4.1 From the open BSP folder described in Section 5.2.5 above, right-click on the filename of the approved construction drawing file (i.e., “DWG”) and select “Open” from the resulting context menu. The file will open in Revu.

Note: For projects consisting of the review and approval of a report only, there will not be a construction drawing file. In these cases, skip to Section 5.4.10 below.

5.4.2 Click the padlock symbol in the filename tab and select “Check Out” from the resulting context menu.

5.4.3 Click the “Thumbnails” tab on the right side of the Revu interface.

5.4.4 Right-click on any sheet of the construction drawing file in the thumbnails panel and select “Apply Stamp…” from the resulting context menu. A dialog box titled “Apply Stamp” will open.

5.4.5 In the “Files” region of the dialog box set the “Pages” field to “All Pages”.

5.4.6 In the “Stamp” region of the dialog box click the caret (i.e., “^” symbol) on the right side of the empty field to activate the pull-down menu. Proceed per Section 5.4.6.1 below for a traditional project or per Section 5.4.6.2 below for a pre-check (PC) project.

5.4.6.1 Select “1_DSA ID Stamp.pdf” from the resulting drop-down menu. Enter 1 inch in the “X Position” field. Enter 1 inch in the “Y Position” field. Select the upper right corner box in the “Anchor” field.

5.4.6.2 Select “3_DSA PC ID Stamp.pdf” from the resulting drop-down menu. Enter 1 inch in the “X Position” field. Enter 0 inch in the “Y Position” field. Select the middle right box in the “Anchor” field.

5.4.7 Click the “OK” button. The dialog box will close, and the stamp will be applied to all sheets of the construction drawings.

5.4.8 If applicable, open and check out the approved specifications file (i.e., “SPC”) as described in Sections 5.4.1 and 5.4.2 above. Click the “Stamp” icon and select “1_DSA ID Stamp.pdf” from the resulting drop-down menu. Click on the page of the specifications containing the stamps and signatures of the DP to apply the stamp.

5.4.9 If applicable, open and check out the approved DSA 103 file (i.e., “103”) as described in Sections 5.4.1 and 5.4.2 above. Click the “Stamp” icon and select “1_DSA ID Stamp.pdf” from the resulting drop-down menu. Click on the designated space of the signature page to apply the stamp.

5.4.10 If applicable, open and check out the approved report file (i.e., “EDCR”, “EER”, or “RAR”) as described in Sections 5.4.1 and 5.4.2 above. Click the “Stamp” icon and select “1_DSA ID Stamp.pdf” from the resulting drop-down menu. Click on the page of the report containing the stamp and signature of the DP to apply the stamp.

5.5 Flatten Approved Documents

After stamping the approved files, the EPR Administrator must flatten the approved documents by performing the following actions:

5.5.1 With the approved construction drawing file (i.e., “DWG”) open and checked out as described in Section 5.4 above, click the “Flatten” icon. A dialog box titled “Flatten Markups” will open.

Note: For projects consisting of the review and approval of a report only, there will not be a construction drawing file. In these cases, the steps described in this section shall be performed on the report (i.e., “EDCR”, “EER”, or “RAR”) file.

5.5.2 In the “Options” region of the dialog box, check all boxes in the “Type” field except the box for “Note”. The “Note” line must be unchecked.

5.5.3 In the “Options” region of the dialog box, verify the box for “Allow Markup Recovery (Unflatten)” field is NOT checked. Uncheck the box if necessary.

5.5.4 Click the “Flatten” button. The dialog box will close, and the file will be flattened.

5.5.5 Click the “Markups” tab and review the Markups List. If markups remain, proceed to Section 5.5.6. If there are no remaining markups, skip to Section 5.5.11 below.

5.5.6 In the “Markups List” tab, click the “Filter List” button. A filtering header will be added to the list.

5.5.7 Click the “Saved Filters” icon, and select from the resulting context menu, the filter dedicated to flattening approved files by the EPR Administrator. If the dedicated filter has not been previously saved, create it in accordance with Section B2.4 below.

5.5.8 After applying the filter, select a markup in the “Markups List”. Apply keystroke “Ctrl+A” to select all remaining markups.

5.5.9 Right-click the selected list of markups and select “Delete” from the resulting context menu.

5.5.10 Clear the “Markups List” filter by clicking (deselecting) the “Filter List” button. If the “Markups List” is empty proceed to Section 5.5.11 below. If markups remain in the “Markups List”, repeat the file flattening actions in Sections 5.5.1 through 5.5.4. If markups remain in the “Markups List” after the second file flattening operation contact the LPR, the regional office EPR plan review lead, and the EPR statewide team lead for project-specific direction.

5.5.11 From the “File” pull-down menu select “Save” or apply keystroke “Ctrl+S” to save the approved file.

5.5.12 Click the page symbol in the file name tab and select “Check In” from the resulting context menu. A dialog box titled “Check In” will open.

5.5.13 Click the “Check In” button. The dialog box will close, and the file will be checked back in to the BSP. Click the "X" in the file name tab to close the file.

5.5.14 If applicable, repeat the actions described in Sections 5.5.1 through 5.5.13 above for the approved specifications file (i.e., “SPC”) and the approved DSA 103 file (i.e., “103”).

5.6 Archive Approved Documents to DSAbox and Navigator

The EPR Administrator must archive the approved documents by performing the following actions:

5.6.1 Download the approved files from the “C. Approval” folder and the form *DSA 153: Inspection Card Building Identifier* from the “B. Plan Review” folder to a temporary working location on a local drive as described in Section B1.5 below.

5.6.2 Access DSAbox via a web browser and navigate to the “Approved Record Set” folder located within the parent folder dedicated to recording approved documents (i.e., folder name containing the “DSA Approvals” designator). Refer to the DSAbox External Library, Module 1, Section 1.3 for complete information on the DSAbox folder structure.

5.6.2.1 Click the “New+” button and select “File Upload” from the resulting context menu. A navigation box titled “Open” will open.

5.6.2.2 Navigate to the temporary location described in Section 5.6.1 above.

5.6.2.3 Select the approved files by clicking on each while depressing the “Ctrl” key.

5.6.2.4 Click the “Open” button to close the navigation box and upload the files.

5.6.3 DP who have set their DSAbox notifications accordingly will receive an email from DSAbox alerting them that approved documents have been uploaded.

5.6.4 Open the Navigator application via the desktop shortcut and log in using the same credentials (i.e., username and password) used to sign onto the Department of General Services (DGS) network.

5.6.4.1 Click the “Add Document” button. The “Add Document” page will open.

5.6.4.2 Click the “Choose Files” button. A navigation window will open.

5.6.4.3 Navigate to the temporary location described in Section 5.6.1 above.

5.6.4.4 Select the file to be uploaded and click the “Open” button.

5.6.4.5 From the drop-down menu in the “Class” field, select the appropriate classification of the file (e.g., Drawings, Specs, Red Folder, etc.) and click the “OK” button. The page will populate with fields associated with the selected document class.

5.6.4.6 Select the appropriate entry from the drop-down menu or type to enter information for all fields required of the document class.

5.6.4.7 Click the “Add” button.

5.6.5 Repeat the actions described in Section 5.6.4 above for each approved file and the form DSA 153.

5.6.6 Delete the temporary files in the working location. Apply keystroke “Windows+E” to open the Windows File Explorer application.

5.6.6.1 Navigate to the temporary location described in Section 5.6.1 above.

5.6.6.2 Click on one of the approval files. Apply keystroke “Ctrl+A” to select all files.

5.6.6.3 Right-click on the selected files and select “Delete” from the resulting context menu.

5.7 Archive Supporting Documents to Navigator

The EPR Administrator must archive the supporting documents by performing the actions described in this section. The procedure described herein requires Bluebeam Revu preferences to be set in accordance with Section A2.2 below.

5.7.1 Verify no files are open in Revu. Close any open files.

5.7.2 Join the BSP for the project to be archived in accordance with Section B1.1 below. Close all other BSP.

5.7.3 From the “File” pull-down menu in Bluebeam Revu, select “Combine…”. A dialog box titled “Open Project File” will open.

5.7.4 Navigate to the plan review documents folder by double-clicking first the parent folder, then the “B. DSA Review” folder, and then the “1. Plan Review Documents” folder. If the project contains multiple increments, navigate further to the applicable increment folder. Navigate to the “Version 1” sub-folder by double-clicking it.

5.7.5 Individually select all PDF files except those listed in Table C2.1 below and the PR Tracking Table. Individual files can be selected by depressing the “Ctrl” key while clicking each applicable file. Click the “OK” button.

5.7.6 During this process Revu may identify one or more files that are protected and cannot be combined. Each such protected file will be identified in a notification box titled “Bluebeam Revu: Warning”. Note each of these files and upload them individually to Navigator in accordance with Section 5.7.15 below. Close each successive notification box by clicking the “OK” button.

5.7.7 The dialog box will close, and a dialog box titled “Combine PDF Files” will open.

5.7.8 If the “1. Plan Review Documents” folder (or the applicable increment subfolder) contains additional supporting documents or subfolders, click the “Add” button. The “Open Project File” dialog box will reopen. Repeat the actions in sections 5.7.5 and 5.7.6 above for each subfolder and until all supporting documents in PDF format to be archived (except those protected as described in section 5.7.6 above) are listed in the “Combine PDF files” dialog box.

5.7.9 In the “Combine PDF Files” dialog box, check the box adjacent to the “Include Bookmarks” field.

5.7.10 Click the “OK” button. The files will be combined into a single PDF file that will open in Revu with the name “Document1”.

5.7.11 From the "File" pull-down menu select "Save As" or apply keystroke "Ctrl+S" to save the combined file. A dialog box titled "Save Project File" will open.

5.7.12 Click the "Save To Disk" button. A navigation window titled "Save As" will open.

5.7.13 Navigate to a temporary working location on a local drive.

5.7.14 Place the cursor in the "File Name" field, delete "Document1", and replace it with "RedFile". Click the "Save" button. The navigation window will close, and the combined file will save to the designated temporary location.

5.7.15 Upload the following files to Navigator as described in Section 5.6.4 above:

5.7.15.1 RedFolder.pdf

5.7.15.2 All individual protected PDF files identified by Revu in Section 5.7.6 above.

5.7.15.3 All individual files in a file format other than PDF.

5.8 DSA Approval Letter

The EPR Administrator must prepare the DSA approval letter by performing the following actions:

5.8.1 Update the eTracker "Plan Check Worksheet" screen under the "Plan Review" tab.

5.8.1.1 In the "Admin Processing" region, enter the date appearing in the DSA identification stamp on the approved documents in the "Date Stamped" field.

5.8.1.2 In the "Admin Processing" region, complete the "Field Review By" field by selecting the name of the field engineer assigned to oversee the project from the pull-down menu. Consult the field team supervisor if the assigned field engineer is unknown.

5.8.1.3 Click the "Save" button. A confirmation dialog box will open.

5.8.1.4 Click the "OK" button to close the confirmation dialog box.

5.8.2 In the "Admin Processing" region of the eTracker "Plan Check Worksheet" screen, click the "Approval of Plan Letter" link. A dialog box titled "Message from webpage" will open.

5.8.3 After reading the dialog box message and performing the verification required, click the "OK" button. The eTracker "Approval of Plan(s) Letter" screen will open.

5.8.4 Click the "Create Letter" button. A confirmation dialog box will open.

5.8.5 Click the "OK" button to close the confirmation dialog box.

5.8.6 Click the "Return to Plan Check WS" button to close the "Approval of Plan(s)" screen and return to the "Plan Check Worksheet" screen.

5.9 Update Bluebeam Studio Notifications

The EPR Administrator must update their notification settings to receive notification emails from Bluebeam Studio when post approval documents are submitted. This critical step is accomplished by performing the following actions:

5.9.1 Click the "Studio" icon to open the Studio tab.

5.9.2 Click the "Projects" icon at the top of the "Studio" tab.

5.9.3 Find the BSP in the list of "Joined" BSP, right-click on the BSP name, and select "Manage Notifications" from the resulting context menu. A new tab will open in Revu titled "Studio Notification Preferences".

5.9.4 Click the box corresponding to the "Enable notifications for this project".

5.9.5 Click the “Apply” button.

5.9.6 Click the “X” in the “Studio Notification Preferences” tab to close the page.

6. POST APPROVAL DOCUMENTS

After the plan review and approval of construction documents, projects frequently require post approval documents. When required, the DP will prepare a post approval document and submit it by uploading the file to the “A. Submission” folder of the BSP in the sub-folder corresponding to the post approval document type. Refer to Table C1.1 below.

Provided notifications have been set in accordance with Section 5.9 above, the shared email account of the EPR Administrator will receive a notification email from Bluebeam Studio when a new post approval document is uploaded. This notification email initiates the EPR Administrator’s actions for processing post approval documents as described in this section. The EPR Administrator is responsible for monitoring the shared EPR email account.

6.1 Document Types

Post approval documents are construction documents prepared after the initial plan review and project approval. Post approval documents are subject to DSA review and approval and generally constitute a change to the originally approved construction documents. The exception to this general rule is the deferred submittal, which represents a planned deferral of the design of a designated scope of work when specifically permitted by DSA. Post approval documents are categorized as one of the following four types based on the nature of the document.

6.1.1 Deferred Submittals

6.1.1.1 Deferred submittals that have been reviewed but not approved will appear in the “Deferred Submittal Not Approved Return of Comments Pending” bin of the “EPR Admin” eTracker dashboard.

6.1.1.2 Deferred submittals that have been reviewed and approved will appear in the “Deferred Submittal Review Complete Ready for Approval” bin of the “EPR Admin” eTracker dashboard .

6.1.1.3 The BSS for Deferred Submittals is named in accordance with Table C1.2 below (i.e., *RO_APPLNO* Deferred Submittal *Project*), with “Deferred Submittal” following the application number.

6.1.1.4 The eTracker “Plan Change Deferred Submittal” screen is located under the “Plan Review” tab.

6.1.2 Revisions

6.1.2.1 Revisions that have been reviewed but not approved will appear in the “Revision Not Approved Return of Comments Pending” bin of the “EPR Admin” eTracker dashboard.

6.1.2.2 Revisions that have been reviewed and approved will appear in the “Revision Review Complete Ready for Approval” bin of the “EPR Admin” eTracker dashboard.

6.1.2.3 The BSS for Revisions is named in accordance with Table C1.2 below (i.e., *RO_APPLNO* Revision *Project*), with “Revision” following the application number.

6.1.2.4 The eTracker “Plan Change Revision” screen is located under the “Plan Review” tab.

6.1.3 Addenda

6.1.3.1 Addenda that have been reviewed but not approved will appear in the “Addendum Not Approved Return of Comments Pending” bin of the “EPR Admin” eTracker dashboard.

6.1.3.2 Addenda that have been reviewed and approved will appear in the “Addendum Review Complete Ready for Approval” bin of the “EPR Admin” eTracker dashboard.

6.1.3.3 The BSS for Addenda is named in accordance with Table C1.2 below (i.e., *RO_APPLNO* Addendum *Project*), with "Addendum" following the application number.

6.1.3.4 The eTracker "Plan Change Addendum" screen is located under the "Plan Review" tab.

6.1.4 Construction Change Documents (CCD)

6.1.4.1 CCD that have been reviewed but not approved will appear in the "CCD Not Approved Return of Comments Pending" bin of the "EPR Admin" eTracker dashboard.

6.1.4.2 CCD that have been reviewed and approved will appear in the "CCD Review Complete Ready for Approval" bin of the "EPR Admin" eTracker dashboard.

6.1.4.3 The BSS for CCD is named in accordance with Table C1.2 below (i.e., *RO_APPLNO* CCD *Project*), with "CCD" following the application number.

6.1.4.4 The eTracker "Construction Change Document" screen is located under the "Field Review" tab.

6.2 Creation of BSS

The EPR Administrator will create a separate BSS for each of the four post approval document types described in Section 6.1 above, as applicable to the scope of the project. The BSS is created when the first post approval document of its type is received. This process is not repeated for subsequent post approval documents of the same type, as they will be reviewed in the same BSS. The EPR Administrator will create a new BSS by performing the following actions:

6.2.1 Process the documents of the first post approval submission received in accordance with Section 6.4 below.

6.2.2 From the open BSP (or see Section B1.1 below) expand the "B. DSA Review" and "1. Post Approval Documents" folders by clicking the caret (i.e., "^" symbol) left of the folder name. Expand the folder corresponding to the subject post approval document type and further expand the folder for the applicable increment if the project has increments. Refer to Table C1.1 below for more information on the BSP folder structure and note that CCD are not segregated by increment.

6.2.3 Right-click on the approval document file described in Section 6.4.7 below.

6.2.4 Select "Add to New Session…" from the resulting context menu. A dialog box titled "Session Name" will open.

6.2.5 Enter the new BSS name in the "Name" field per Section 6.1 above and Table C1.2 below, where *RO* is the DSA regional office identification number (i.e., 01: Oakland, 02: Sacramento, 03: Los Angeles, 04: San Diego), *APPLNO* is the six-digit project application number, and *Project Name* matches that used in eTracker. The following examples illustrate BSS naming for a hypothetical San Diego regional office project assigned application number "123456" at Lincoln High School:

6.2.5.1 BSS for Deferred Submittals: 04_123456 Deferred Submittal Lincoln High School.

6.2.5.2 BSS for Revisions: 04_123456 Revision Lincoln High School.

6.2.5.3 BSS for Addenda: 04_123456 Addendum Lincoln High School.

6.2.5.4 BSS for CCD: 04_123456 CCD Lincoln High School.

6.2.6 Click the "OK" button. The dialog box will close, and a new BSS will be created. The new BSS will open and appear in the "Studio" tab when the "Sessions" icon adjacent to the "Studio" title is selected.

6.2.7 Set permissions for the new BSS in accordance with Section 3.7 above.

6.3 eTracker Record

Each post approval document is managed in eTracker with a specific screen dedicated to this purpose. The post approval document summary screen is accessed from the eTracker tab identified in Section 6.1 above by entering the regional office identification number and application number in the “Origin Id” and “App Id” fields, respectively. Upon notification of receipt of a new post approval document, the EPR Administrator will open the applicable post approval document summary screen and perform the following actions:

6.3.1 If the submitted post approval document is an initial submission (i.e., version 1 with filename containing the “_V1” suffix), create a new post approval document record in accordance with this section. If the submitted document is a resubmission (i.e., version greater than 1 with filename containing a “_V2” or greater suffix), proceed to Section 6.3.2 below.

6.3.1.1 From the post approval document summary screen click the “Add” button. A blank post approval document record screen will open.

6.3.1.2 In the “App Id” field, select the applicable regional office identification number from the pull-down menu and enter the six-digit project application number.

6.3.1.3 Select the increment from the pull-down menu in the “Increment” field if applicable.

6.3.1.4 For a Deferred Submittal, select the deferred submittal type from the pull-down menu in the “Deferred Submittal Item” field.

Note: If the submitted item does not appear in the pull-down menu, the EPR Administrator must notify the DP via email that the submitted item is not permitted as a deferred submittal for the subject project. The LPR and DSA field engineer must be copied on the notification email, and the DP will be referred to the LPR for further direction and explanation of scope items permitted to be deferred for the specific project. If the submitted item does not appear in the eTracker list simply because the filename has not followed the naming convention of Table C2.4 below, the DP may rename the file accordingly.

6.3.1.5 For an Addendum, Revision, or CCD enter the number or the sequential designator as described in Table C2.3 below in the corresponding field.

6.3.1.6 Enter the receipt date of the Bluebeam Studio notification email in the “Received Date” field.

6.3.1.7 Click the “Save” button to save entries. Leave the eTracker screen active (i.e., do not close the window) and proceed to Section 6.4 below.

6.3.2 If the submitted document is a resubmission (i.e., version greater than 1 with filename containing a “_V2” or greater suffix), verify review of the previous version is complete.

6.3.2.1 From the post approval document summary screen, click the link for the subject post approval document record.

6.3.2.2 If the “Returned Date” has been entered for the previous submission, completion of the previous review is confirmed. Enter the receipt date of the Bluebeam Studio notification email in the next available “Resubmittal Date” field. Leave the eTracker screen active (i.e., do not close the window) and proceed to Section 6.4 below.

6.3.2.3 If the “Returned Date” has not been entered for the previous submission, then the previous version is still being reviewed, and the new submission must be rejected. The EPR Administrator must send an email to the DP stating that the resubmission is rejected and cannot be accepted until review of the previous submission is complete and all plan review comments have been addressed in accordance with PR 18-04 Sections 3.2 and 3.3.

6.4 Process Submitted Documents

In accordance with PR 18-04, post approval submissions consist of no more than two files: (1) an approval document file and (2) a supporting document file when necessary. The EPR Administrator will process conforming submissions by performing the following actions:

6.4.1 Open the BSP via the link in the Bluebeam Studio notification email or as described in Section B1.1 below and expand the "A. Submission" and "1. Post Approval Documents" folders by clicking the caret (i.e., "^" symbol) left of the folder name. Expand the folder corresponding to the subject post approval document type and further expand the folder for the applicable increment if the project has increments. Refer to Table C1.1 below for more information on the BSP folder structure and note that CCD are not segregated by increment.

6.4.2 Verify the submitted files are named in accordance with the naming convention defined in Table C2.3 and C2.4 below. If the filename or version is incorrect, rename the file accordingly. The filename of the supporting document file shall be the same as the approval document file with the additional of the suffix "_SupportingDocument".

6.4.3 Open the approval document file as described in Section B1.3 below.

6.4.3.1 Verify the document preparation per Checklist D3 in Appendix D below.

6.4.3.2 Validate the status menu per Checklist D2 in Appendix D below.

Note: If this step is not performed accurately, review cannot be completed in accordance with PR 18-04 and PR 18-06.

6.4.4 Open the supporting document file (if applicable) as described in Section B1.3 below. Verify preparation of the document per Checklist D3 in Appendix D below.

6.4.5 If the submitted documents are not properly prepared in accordance with this section and Appendix D below, the EPR Administrator must notify the DP by email and provide an itemized list of deficiencies. The DP must be advised that review of the post approval document cannot proceed until the deficiencies are corrected.

6.4.6 If the submitted documents are properly prepared in accordance with this section and Appendix D below, the EPR Administrator will move the files from the "A. Submission" folder to the "B. DSA Review" folder as follows:

6.4.6.1 Click the approval document file in the submitted location. While holding down the "Ctrl" key, click the supporting document file if applicable.

6.4.6.2 Right-click the selected filename and select "Cut" from the resulting context menu.

6.4.6.3 Navigate to the corresponding sub-folder in the "B. Plan Review" folder by expanding it and the "2. Post Approval Documents" folder by clicking the caret (i.e., "^" symbol) left of the folder name. Expand the folder corresponding to the subject post approval document type and further expand the folder for the applicable increment if the project has increments. Refer to Table C1.1 below for more information on the BSP folder structure and note that CCD are not segregated by increment.

6.4.6.4 Right-click the target folder (i.e., the applicable post approval document type sub-folder or the applicable increment sub-folder therein) and select "Paste" from the resulting context menu.

6.4.7 If the submitted post approval document is the first of its type for the given project, use the approval document file to create a new BSS in accordance with Section 6.2 above. If a BSS has already been created per Section 6.2 above for the post approval document type, add the approval document file to the existing BSS as described in Section B1.6 below.

6.5 Update eTracker

After processing the submitted files, the EPR Administrator must complete the post approval document record in eTracker by performing the following actions:

6.5.1 If the submitted document is an initial submission (i.e., version 1 with filename containing the "_V1" suffix), update the eTracker post approval document record to initiate the triage process. Return to the eTracker record left open per Section 6.3.1.7 above. If the submitted document is a resubmission (i.e., version greater than 1 with filename containing a "_V2" or greater suffix), proceed to Section 6.5.2 below.

6.5.1.1 Enter the "Status" field in accordance with the triage practice of the local regional office for the given post approval document type. Refer to PR 18-06 Section 4.2 for a further description of the variation in triage practice.

6.5.1.1.1 If triage duties are performed by a single individual, use the pull-down menu to enter "Required" under "SSR" and "Not Required" under "FLSR" and "AC".

6.5.1.1.2 If triage duties are performed by a separate individual for each plan review discipline, use the pull-down menu to enter "Required" under "SSR", "FLRS", and "AC".

6.5.1.2 Enter the current date in the "Date" field under "SSR", "FLRS", and "AC".

6.5.1.3 Use the pull-down menu to enter the regional office code under "SSR", "FLRS", and "AC" in the "Anticipated Office" field.

6.5.1.4 Under each plan review discipline with its "Status" field set as "Required" use the pull-down menu to enter the staff member responsible for triage duties in the "Plan Reviewer" field.

6.5.1.5 Click the "Save" button and close the eTracker record.

6.5.2 If the submitted document is a resubmission (i.e., version greater than 1 with filename containing the "_V2" or greater suffix), return to the eTracker record left open per Section 6.3.2.2 above.

6.5.2.1 For each plan review discipline with its "Status" field set as "Disapproved" use the pull-down menu to change the "Status" field to "Required".

6.5.2.2 Under each plan review discipline with its "Status" field set as "Required" per Section 6.5.2.1 above, enter the current date in the "Date" field.

6.5.2.3 Click the "Save" button and close the eTracker record.

6.6 Disapproved Submission

When all required plan review disciplines have completed review of a post approval document, but it is not approved, it will appear in the applicable bin of the "EPR Admin" eTracker dashboard as described in Section 6.1 above. The EPR Administrator will update eTracker and notify the DP by performing the following actions:

6.6.1 Using the standard email template established locally by the regional office, notify the DP that review of the post approval document is finished, and corrections are required. The notification email shall include the following information:

6.6.1.1 Notice that the plan review is complete for all disciplines.

6.6.1.2 Reference to PR 18-04 for the duties and responsibilities of the DP.

6.6.1.3 Nine-digit identification number and link (i.e., URL) to the BSS.

6.6.2 From the "EPR Admin" eTracker dashboard click the "Select" button for the post approval document. The eTracker post approval document record will open.

6.6.2.1 Enter the date the email described in Section 6.6.1 above is sent in the “Return Date” field associated with the current review (i.e., the blank field adjacent to the latest existing “Received Date” or “Resubmittal Date”).

6.6.2.2 Click the “Save” button and close the eTracker record.

6.7 Approved Submission

When a post approval document is approved by all required plan review disciplines, it will appear in the applicable bin of the “EPR Admin” eTracker dashboard as described in Section 6.1 above. The EPR Administrator will stamp the approval document file and update eTracker by performing the following actions:

6.7.1 From the “EPR Admin” eTracker dashboard click the “Select” button for the post approval document. The eTracker post approval document record will open.

6.7.1.1 Enter the date that appears on the stamp described in Section 6.7.8 below in the “Approved Date” field.

6.7.1.2 Click the “Save” button and close the eTracker record.

6.7.2 Update the DSA approval stamp as follows. Refer to Section A3 below for additional information on adding stamps.

6.7.2.1 In Revu, click the “Stamp” icon. From the resulting drop-down menu, hover over “2S_DSA Approval Stamp.pdf” and click the pencil symbol for editing located to the right of the stamp name. A new tab will open with the stamp in edit mode. See Figure C6.1 below.

6.7.2.2 Place the cursor in the “APP” field and enter the project application number in the format *RO-APPLNO*, where *RO* is the DSA regional office identification number and *APPLNO* is the six-digit project application number.

6.7.2.3 Place the cursor in the “INC” field and enter the increment number. If the project does not have increments or the post approval document is a CCD, delete any entry in the “INC” field.

6.7.2.4 Check the box for each plan review discipline that reviewed and approved the post approval document (i.e., “SS” for structural safety, “FLS” for fire and life safety, “ACS” for access compliance) in accordance with the eTracker post approval document record.

6.7.2.5 From the “File” pull-down menu select “Save” or apply keystroke “Ctrl+S” to save the updates.

6.7.2.6 Click the "X" in the file name tab to close the stamp edit mode.

6.7.3 Join the BSP as described in Section B1.1 below. Join the BSS as described in Section B1.2 below.

6.7.4 Open the approval document file with the largest version number (i.e., “_V* suffix) in the BSS as described in Section B1.3 below. While the approval file is still in the BSS, record the quantity of markups in the "Markups List". For files with a large number of markups or markups from numerous authors, the method described in Section 5.2.3 above is recommended.

6.7.5 Save the approval document file to the “C. Approval Folder” in BSP. Click the “Save As (DMS)” icon. A BSP navigation window will open titled ‘Save Project File”. Within the navigation window folders can be expanded to show sub-folders by double clicking.

6.7.5.1 For a project without increments and for CCD on all projects, select the applicable post approval document type sub-folder under the “2. Post Approval Documents” folder.

6.7.5.2 For post approval documents other than CCD on projects with increments, select the sub-folder for the applicable increment within the post approval document type sub-folder.

6.7.5.3 Click the “OK” button to save the approval file.

Note: At the EPR administrator’s discretion, the file may be first saved to the local computer and later uploaded to the BSP after application of the approval stamp as described below.

6.7.6 Immediately after saving the file to the BSP (or local drive) and prior to performing any other action on the file, check the quantity of markups in the "Markups List". Compare the quantity of markups in the downloaded file to that previously recorded from the file in the BSS as described in Section 6.7.4 above. If the quantity of markups matches the file in the BSS, proceed as described below. If any discrepancy is observed, discontinue the stamping process and immediately contact the LPR, the regional office EPR plan review lead, and the EPR statewide team lead.

6.7.7 Right-click the file name in the BSP folder described in Section 6.7.5 above. Select “Rename…” from the resulting context menu. A dialog box titled “Rename” will open.

6.7.7.1 Place the cursor in the “Name” field of the dialog box and add a prefix in the format *RO-APPLNO_*, where *RO* is the DSA regional office identification number and *APPLNO* is the six-digit project application number. Move the cursor to the end of the file name and replace the version suffix with the suffix “_A”.

6.7.7.2 For example, the approved CCD_003 file for a San Diego regional office project assigned application number “123456” would be named thus: 04-123456_CCD_003_A.

6.7.7.3 Click the “OK” button. The dialog box will close, and the file name will be changed.

6.7.8 Open and check out the approval document as described in Section B1.3 below. Apply the stamp prepared per Section 6.7.2 above to the various components of the approval document as follows.

6.7.8.1 Click the “Stamp” icon and select the “2S_DSA Approval Stamp.pdf” stamp from the resulting drop-down menu. Apply the stamp to the form *DSA 140: Application for Submittal of Post-Approval Document* by clicking in the space at the bottom right corner reserved for its placement.

6.7.8.2 If the post approval document contains specifications apply the stamp by clicking on the signature page in accordance with Section 5.4.8 above.

6.7.8.3 If the approval document contains a DSA 103 apply the stamp by clicking on the signature page in accordance with Section 5.4.9 above.

6.7.8.4 If the approval document contains drawings, apply the stamp to each individual sheet in accordance with Sections 5.4.3 to 5.4.7 above with the following modifications:

6.7.8.4.1 Modify Section 5.4.5 to select only those pages in the file that are drawing sheets.

6.7.8.4.2 Modify Section 5.4.6 to select “2S_DSA Approval Stamp.pdf” from the resulting drop-down menu. For sheet sizes other than the original full-size sheets, enter 0.25 inch in the “X Position” field and 0.25 inch in the “Y Position” field.

6.7.9 After application of the DSA approval stamp, flatten the approval document file in accordance with Section 5.5 above.

6.7.10 Upload the approval document file to DSAbox in accordance with Sections 5.6.1 and 5.6.2 above with the following modification: Upload the file to the DSAbox folder dedicated to the applicable post approval document type, not the “Approved Record Set” folder.

6.7.11 Archive the approval document file through the Navigator application in accordance with Section 5.6.4 above.

ABBREVIATIONS

BSP – Bluebeam Studio Project

BSS – Bluebeam Studio Session

CCD – Construction Change Document

DP – Design Professional(s)

LPR – Lead Plan Reviewer

GLOSSARY

Addendum

A post approval document used by the DP to change the DSA-approved construction documents during the bidding phase and prior to the award of a construction contract.

Bluebeam Studio Project (BSP)

A digital space to manage project files and BSS.

Bluebeam Studio Session (BSS)

A collaborative digital space for reviewing, commenting, and closing of comments.

Construction Change Document (CCD)

A post approval document used by the DP to implement minor changes to the DSA-approved construction documents made after a contract for the work has been awarded. Refer to *IR A-6: Construction Change Document Submittal and Approval Process* for additional information.

Consultant Plan Reviewer

A plan reviewer hired and trained by DSA to perform plan review and back check with the DP. The consultant plan reviewer's responsibilities in EPR are described in PR 18-05.

Deferred Submittal

A portion of the project for which DSA permits the design, plan review, and approval to be deferred until after approval of the primary construction documents.

Design Professional (DP)

The architect or structural engineer in general responsible charge of the project and other architects and engineers delegated responsibility for a portion of the work. DP responsibilities in EPR are described in PR 18-04.

DSAbox

A cloud-based storage site where DSA project files are located.

DSA Bluebeam Studio Profile

A compilation of software interface settings and resources (e.g., tool sets) that are established by DSA for each plan review discipline and the EPR Administrator to promote consistency and efficiency in EPR.

EPR Administrator

The DSA staff member who sets up the BSP and BSS, assigns collaborators, and performs various other administrative tasks. The EPR Administrator's responsibilities in EPR are described in this PR.

Lead Plan Reviewer (LPR)

The DSA plan reviewer who arranges the back check with the DP and the other plan reviewers and notifies the EPR Administrator when the plan review documents are approved. The LPR is assigned based on the plan review disciplines required for the project as follows:

- Structural Safety (SS) plan reviewer for projects with SS review.
- Access Compliance (AC) plan reviewer for projects without SS review.
- Fire and Life Safety (FLS) plan reviewer for projects without SS and ACS review.
- When the discipline designated as the LPR is performed by more than one plan reviewer, the plan reviewer assigned the largest percentage of the review will perform the LPR duties.

Over-the-Counter (OTC) Review

An expedited review and approval process offered by DSA for projects meeting the eligibility criteria defined in *PL 07-02: Over-the-Counter Review of Projects Using Pre-Check (PC) Approved Designs*. OTC review is primarily intended for single-story relocatable buildings and other simple projects utilizing designs that have been preapproved in accordance with *PR 07-01: Pre-Check Approval*.

Plan Review Tracking Table

A document in the plan review BSS used to keep track of the plan review status. This document is for DSA use only.

Revision

A post approval document used by the DP to change the DSA-approved construction documents prior to the start of construction or during construction when the scope exceeds that appropriate for CCD.

APPENDIX A: GETTING STARTED

A1. DEMO BLUEBEAM STUDIO AND REVU FUNCTIONS

A1.1 DSA Bluebeam Studio Profile

EPR Administrators will perform the following actions to import or update their DSA Bluebeam Studio Profile:

A1.1.1 Open the BSP titled "_DSA EPR Support" in accordance with Section B1.1 below. Consult the regional office EPR plan review lead for the BSP nine-digit identification number.

A1.1.2 Open the "Profiles" folder and the sub-folder corresponding to the work environment.

A1.1.2.1 If working in an environment connected to the DGS network (e.g., employee workstation in a DSA office, laptop connected to the DGS virtual private network, etc.) open the "_OnNetwork" folder.

A1.1.2.2 If working in an environment disconnected from the DGS network (e.g., home computer, etc.) open the "_OffNetwork" folder.

A1.1.3 Double-click the BPX file containing "EPR Administrator" in the file name. The profile will be loaded with tool sets, status menu, and other interface settings in accordance with DSA standards.

A1.1.4 If the user is updating their DSA Bluebeam Studio profile, click the "Yes" button on dialog boxes asking to overwrite existing settings. It is generally not necessary to update "on network" profiles unless specifically directed to do so.

A1.1.5 Click the "OK" button of the dialog box indicating the successful import of the profile.

A1.2 Demo Bluebeam Studio

EPR Administrators can explore Bluebeam Studio through the following actions:

A1.2.1 Join a BSP in accordance with Section B1.1 below. New EPR Administrators should consult their supervisor for a sample BSP to be used for the demo. The BSP folder structure will be in accordance with Table C1.1 below.

A1.2.2 Navigate the BSP folder structure and open files in BSP in accordance with Section B1.3 below.

A1.2.3 Join a BSS in accordance with Section B1.2 below. Each BSS corresponds to a folder in the BSP as defined in Table C1.2 below.

A1.2.4 Open files in the BSS in accordance with Section B1.3 below.

A1.2.5 While in the BSS ensure online connectivity. Under the "Studio" tab confirm that the plug icon is connected and there is a green dot.

A1.2.6 In the "Attendees" region of the "Studio" tab verify the user's name conforms to the following convention: *RO* – DSA EPR Administrator, where RO is the two-digit regional office identification number (i.e., 01: Oakland, 02: Sacramento, 03: Los Angeles, or 04: San Diego). If it does not, refer to Section B3.1 below.

A2. BLUEBEAM REVU AND STUDIO SETTINGS

The EPR procedure and specifically the EPR Administrator actions described in this PR rely on various Bluebeam Revu and Studio settings in accordance with this section.

A2.1 Email Notification Settings

The EPR procedure relies upon notification emails sent by Bluebeam Studio. EPR Administrator accounts must have email notification preferences set in accordance with this section by performing the following actions. The procedure described here is a one-time process that has already been performed for all EPR Administrator accounts. This process need not be repeated when a new staff member assumes the EPR Administrator role, but it is retained here for the record.

A2.1.1 Open the "Preferences" dialog box by clicking on the "Preferences" button, selecting "Preferences" from the "Revu" pull-down menu, or applying keystroke "Ctrl+K".

A2.1.2 Click on the "Studio" left tab and "Servers" top tab.

A2.1.3 Click on the "Notification Preferences" link. A webpage will open within Bluebeam Revu.

A2.1.4 In the "Account Preferences" section of the webpage edit the settings as follows:

A2.1.4.1 Check the box for "Send me an email when an active Project is updated".

A2.1.4.2 Confirm all other "Account Preference" options are unchecked.

A2.1.4.3 Click the "Apply" button.

A2.1.4.4 Close the webpage by clicking the "X" on the page tab.

A2.2 Bluebeam Revu Preferences

Directions given to the EPR Administrator in this PR require preferences to be set according to the following actions:

A2.2.1 Open the "Preferences" dialog box by clicking on the "Preferences" button, selecting "Preferences" from the "Revu" pull-down menu, or applying keystroke "Ctrl+K".

A2.2.2 Click on the "Studio" screen left tab and "Options" top tab.

A2.2.3 Uncheck the box corresponding to "Open and save files to Studio from toolbar only".

A2.2.4 Click the "OK" button to accept the settings and close the "Preferences" dialog box.

A3. IMPORT STAMPS

The EPR Administrator applies stamps to documents approved by DSA through the EPR process. The standard stamps are imported from the following server location in accordance with this section: X:\Electronic Plan Review\Administrator\Stamps.

A3.1 Identification Stamps

The identification stamp designates construction documents approved during plan review and is applied per Section 5 above. There are two identification stamps: one for typical projects (i.e., 1_DSA ID Stamp.pdf) and one for PC projects (i.e., 3_DSA PC ID Stamp.pdf). Refer to Figures C5.1 and C5.2 below. The EPR Administrator will import the identification stamps by performing the following actions:

A3.1.1 Click the "Stamp" icon.

A3.1.2 Select "Import Stamp" from the resulting context menu. A navigation window titled "Open" will open.

A3.1.3 Navigate to the folder identified in Section A3 above.

A3.1.4 Select "1_DSA ID Stamp.pdf" by clicking on the filename.

A3.1.5 Select "3_DSA PC ID Stamp.pdf" by applying the "Ctrl" key and clicking on the filename.

A3.1.6 Click the "Open" button. The navigation window will close, and the standard stamps will be imported.

A3.2 Approval Stamp

The approval stamp designates approved post approval documents and is applied per Section 6 above. Refer to Figure C6.1 below. The EPR Administrator will import the approval stamp by performing the following actions:

A3.2.1 Click the “Stamp” icon.

A3.2.2 Select “Import Stamp” from the resulting context menu. A navigation window titled “Open” will open.

A3.2.3 Navigate to the folder identified in Section A3 above.

A3.2.4 Select “2S_DSA Approval Stamp.pdf” by clicking on the filename.

A3.2.5 Click the “Open” button. The navigation window will close, and the standard stamps will be imported.

APPENDIX B: WORKING IN BLUEBEAM STUDIO WITH BLUEBEAM REVU

B1. STUDIO OPERATIONS

B1.1 Join a Bluebeam Studio Project (BSP)

EPR Administrators will join a BSP by performing the following actions:

B1.1.1 Click the "Select" button on the eTracker dashboard for the desired project.

B1.1.2 Use the cursor to highlight the nine-digit number from the "EPR ID" field on the eTracker "Plan Check Worksheet" screen and apply keystroke "Ctrl+C" to copy the number.

B1.1.3 Open the Bluebeam Revu software application.

B1.1.4 Sign in to Bluebeam Studio if the sign in does not occur automatically.

B1.1.5 Under the "Studio" tab click on the "+" button and select "Join" from the resulting context menu. A dialog box titled "Join" will open.

B1.1.6 Place the cursor in the "Studio ID" field of the dialog box and apply keystroke "Ctrl+V" to paste the nine-digit EPR ID number.

B1.1.7 Click the "OK" button. The BSP will open.

B1.1.8 After a BSP has been initially joined by a Bluebeam Studio account, it will thereafter appear in the list of "Joined" BSP found on the "Studio" tab. The user can join this BSP in the future simply by clicking on the BSP name in the "Joined" list.

B1.2 Join a Bluebeam Studio Session (BSS)

EPR Administrators will join a BSS by performing the following actions:

B1.2.1 Join the BSP as described in Section B1.1 above.

B1.2.2 Right-click on the BSP name and select "Sync" from the resulting context menu.

B1.2.3 Right-click on the BSP name and select "Show Sessions…" from the resulting context menu. A dialog box titled "Available Sessions" will open.

B1.2.4 From the resulting dialog box select the desired BSS to join. The BSS will be named according to Table C1.2 below.

B1.2.5 Click the "Join" button to close the dialog box and join the BSS.

B1.2.6 After a BSS has been initially joined by a Bluebeam Studio account, it will thereafter appear in the list of "Joined" BSS found on the "Studio" tab. The user can join this BSS in the future simply by clicking on the BSS name in the "Joined" list.

B1.3 Navigation in Bluebeam Studio

Navigation of folders and files in Bluebeam Studio will be performed using the various operations described in this section.

B1.3.1 To expand and show the contents of a collapsed folder in BSP, double-click on the folder name or click the caret left of the folder name.

B1.3.2 To open a file in BSP or BSS, right-click on the filename and select "Open" from the resulting context menu.

B1.3.3 To "check out" an open BSP file, click on the lock icon in the document name tab and select "Check Out" from the resulting context menu.

B1.3.4 To save a checked out BSP file, select "Save" from the "File" pull-down menu or apply keystroke "Ctrl+S".

B1.3.5 To “check in” an open BSP file, click on the page icon in the document name tab and select “Check In” from the resulting context menu. A dialog box titled “Check In” will open. Add a comment if desired and click the “Check In” button on the resulting dialog box. The “check in” function saves changes made to the document while it was checked out.

B1.3.6 To undo the “check out” of an open BSP file, click on the page icon in the document name tab and select “Undo Checkout” from the resulting context menu. The “undo check out” function discards (does not save) changes made to the document while it was checked out.

B1.3.7 To delete a file from BSP, right-click on the filename and select “Delete…” from the resulting context menu. A dialog box titled “Delete Files and Folders” will open. Click the “Yes” button.

B1.3.8 To delete a file from a BSS, perform the following actions (files can only be deleted from a BSS by its owner):

B1.3.8.1 Click the “X” right of the filename in the “Documents” region of the “Studio” tab.

B1.3.8.2 A dialog box titled “Delete File From Session” will open. Click the “Yes” button.

B1.3.8.3 The dialog box will offer the option to save a local copy of the file. Click the “Yes” or “No” button in accordance with the operational need of the file deletion.

B1.4 Add a File to Bluebeam Studio Project (BSP)

EPR Administrators can add files to a BSP by performing the following actions:

B1.4.1 Join the BSP as described in Section B1.1 above.

B1.4.2 Navigate to the target folder in the BSP to which the file is to be uploaded as described in Section B1.3. above.

B1.4.3 Right-click on the target folder.

B1.4.4 Select “Upload Files…” from the resulting context menu. A dialog box titled “Upload Files” will open.

B1.4.5 In the resulting dialog box, click on the “Add” button.

B1.4.6 Select “Files” from the resulting context menu. A navigation box titled “Add Files” will open.

B1.4.7 Navigate to the location where the file to be uploaded has been saved locally.

B1.4.8 Select the file(s) to upload. Multiple files can be selected concurrently by applying the “Ctrl” key.

B1.4.9 Click the “Open” button. The navigation window will close, and the dialog box titled “Upload Files” will reopen.

B1.4.10 Click the “OK” button to close the dialog box and upload the files.

B1.5 Download a File from Bluebeam Studio Project (BSP)

EPR Administrators can download files from a BSP by performing the following actions:

B1.5.1 Join the BSP as described in Section B1.1 above.

B1.5.2 Navigate to the subject folder in the BSP from which the file is to be downloaded as described in Section B1.3. above.

B1.5.3 Right-click on the filename of the file to be downloaded.

B1.5.4 Select “Download Copy” from the resulting context menu. A navigation box titled “Save As” will open.

B1.5.5 Navigate to the location where the downloaded file will be saved locally.

B1.5.6 Click the “Save” button to close the window and complete the download.

B1.6 Add a File to Bluebeam Studio Session (BSS) from Bluebeam Studio Project (BSP)

EPR Administrators will add BSP files to an associated BSS by performing the following actions:

B1.6.1 Join the BSP as described in Section B1.1 above.

B1.6.2 Join the BSS as described in Section B1.2 above.

B1.6.3 Navigate to the folder location in the BSP where the document to be added to the BSS has been saved.

B1.6.4 Right-click on the name of the file and select “Add to Existing Session" from the resulting context menu.

B1.6.5 Select the intended BSS from the resulting sub-context menu.

B1.7 Add a File to Bluebeam Studio Session (BSS)

EPR Administrators can add files to a BSS from a local or mapped network drive by performing the following actions:

B1.7.1 Join the BSS as described in Section B1.2 above.

B1.7.2 In the “Documents” region of the “Studio” tab with the “Sessions” icon selected, click the “Add File” icon to the right of the “Documents” title. A navigation box titled “Add Files to Session” will open.

B1.7.3 Navigate to the folder where the document to be added to the BSS is saved.

B1.7.4 Select the file(s) to be added to the BSS. Multiple files can be selected by holding down the “Ctrl” key.

B1.7.5 Click the “Open” button to close the window and complete the process of adding files.

B1.8 Finish a Bluebeam Studio Session (BSS)

The EPR Administrator must finish BSS when listed in any bin of the “Finish Session” dashboard of eTracker. The EPR Administrator is responsible for monitoring the “Finish Session” dashboard. EPR Administrators will finish BSS by performing the following actions:

B1.8.1 Open the BSP per Section B1.1 above. The nine-digit EPR ID number can be copied from the eTracker “Session” screen under the “Certification” tab, which is accessed by the “Select” button on the “Finish Session” dashboard.

B1.8.2 Open the BSS to be finished per Section B1.2 above.

B1.8.3 Under the “Studio” tab with the “Sessions” icon selected click the name of the BSS.

B1.8.4 Select “Finish Session” from the resulting context menu. A dialog box titled “Finish Session” will open.

B1.8.5 In the “Save Options” region of the dialog box, select the “Do not save files” field.

B1.8.6 In the “Report Options” region of the dialog box, uncheck the “Generate Report” field.

B1.8.7 Click the “OK” button. The dialog box will close, and the session will be finished (i.e., deleted).

B1.8.8 Enter the current date in the applicable “Finish Session Date” field on the eTracker “Session” screen under the “Certification” tab. Click the “Save” button.

B1.9 Reactivate a Bluebeam Studio Session (BSS)

If a BSS has been finished inadvertently or prematurely, it can be reactivated within 120 days of the date it was finished. If more than 120 days have passed, the contents of the BSS cannot be restored or otherwise retrieved. EPR Administrators can reactivate BSS within 120 days by performing the following actions:

B1.9.1 From a web browser of choice navigate to signin.bluebeam.com.

B1.9.2 Enter the EPR Administrator’s shared email address in the “Bluebeam ID” field and click the “Next” button. A new webpage will open.

B1.9.3 Enter the EPR Administrator’s Studio account password in the “Password” field and click the “Sign In” button. The Studio account webpage will open.

B1.9.4 Click the “My Sessions” tab on the left side of the account page.

B1.9.5 Click on the BSS to be reactivated. A webpage specific to the selected BSS will open.

B1.9.6 From the pull-down menu, change the “Status” field to “Active”.

B1.9.7 Click the “Update data” button.

B1.9.8 Click the “Logout” link in the upper right region of the webpage to exit the account.

B2. EPR OPERATIONS

B2.1 “PR Tracking Table” Document

During the plan review of a project each plan reviewer will use the “PR Tracking Table” document to manage contact information, the status of the review, and documents that have been received and are under review. At the completion of plan review the EPR Administrator will use the “PR Tracking Table” document to determine which version of the documents are approved and should be stamped.

B2.1.1 Refer to PR 18-06 Section B2.1 for a description of the plan reviewers’ responsibilities relative to the “PR Tracking Table” document.

B2.1.2 The EPR Administrator will stamp the documents and versions clearly identified in the “Document Review Summary” section of the column of the “PR Tracking Table” dedicated to the LPR. The “Document Review Summary” sections of the columns dedicated to the other plan reviewers should be crossed out.

B2.1.2.1 When a document is approved, the document name listed in the “PR Tracking Table” will be amended by the plan reviewer by adding the suffix “_A”.

B2.1.2.2 When a document is approved contingent on revisions made to the file by the DP in the BSS, the document name listed in the “PR Tracking Table” will be amended by the plan reviewer by adding the suffix “_AsCorrected”.

B2.1.3 The EPR Administrator must confirm all plan reviewers have placed an “X” in the box confirming they have moved all supporting documents that are to be retained in DSA records to the “B. DSA Review” folder.

B2.2 DSA Direct Employee List: Add Employees

The EPR Administrator is responsible for managing their regional office’s “DSA Direct Employee” list. When a new technical staff member joins the regional office or a technical staff member from another regional office is working on a project, the EPR Administrator must add their Studio account (i.e., email address) to the “DSA Direct Employees” list by performing the following actions:

B2.2.1 Join a current BSP per Section B1.1 above.

B2.2.2 Click the “Project Settings” icon above the BPS name. A dialog box titled “Project Settings” will open.

B2.2.3 Click the “Permissions” tab.

B2.2.4 Click the third icon in the “User/Groups” field. A dialog box titled “Group Membership Management” will open.

B2.2.5 Select “DSA Direct Employees” in the “Groups” field.

B2.2.6 Click the icon with a green plus symbol in the “Members” field. A dialog box titled “Add User” will open.

B2.2.7 Place the cursor in the “Email” field and type or paste the DGS email address of the employee to be added. Click the “OK” button to close the “Add User” dialog box.

B2.2.8 Click the “OK” button to close the “Group Membership Management” dialog box.

B2.2.9 Click the “Apply” button in the “Project Settings” dialog box, then click the “OK” button to close it.

B2.3 DSA Direct Employee List: Remove Employees

The EPR Administrator is responsible for managing their regional office’s “DSA Direct Employee” list. When a technical staff member leaves DSA, the EPR Administrator will remove their Studio account (i.e., email address) from the “DSA Direct Employee” list by performing the following actions:

B2.3.1 Join a current BSP per Section B1.1 above.

B2.3.2 Click the “Project Settings” icon above the BPS name. A dialog box titled “Project Settings” will open.

B2.3.3 Click the “Permissions” tab.

B2.3.4 Click the third icon in the “User/Groups” field. A dialog box titled “Group Membership Management” will open.

B2.3.5 Select “DSA Direct Employees” in the “Groups” field.

B2.3.6 Click the email address of the staff member to be removed in the “Members” field.

B2.3.7 Click the icon with the red “X” symbol in the “Members” field. The selected name will be removed from the list.

Note: There are red “X” symbols for deletion in both the “Groups” and “Members” fields. It is critical that the delete symbol for the “Members” field is clicked and NOT the delete symbol for the “Groups” field.

B2.3.8 Click the “OK” button to close the “Group Membership Management” dialog box.

B2.3.9 Click the “Apply” button in the “Project Settings” dialog box, then click the “OK” button to close it.

B2.4 Markups List Filter for Flattening

When flattening approved documents, Section 5.5.7 above directs the EPR Administrator to use a saved filter setting in the “Markups List”. The EPR Administrator will create this saved filter by performing the following actions:

B2.4.1 Open the “Markups List” tab by clicking the “Markups” icon.

B2.4.2 Click the “Filter List” button. The filter header will be added to the “Markups List”.

B2.4.3 Click the filter header above the “Subject Column and select “Custom” from the resulting context menu. A dialog box titled “Custom Filter | Subject” will open.

B2.4.4 In the “Choose a Filtering Rule” column, use the pull-down menu to select "begins with” for the first rule.

B2.4.5 Place the cursor in the corresponding “Choose a Filtering Value” field and type: "Re:”.

B2.4.6 Click the “OR” button below the first rule. A second rule will be created.

B2.4.7 In the “Choose a Filtering Rule” column, use the pull-down menu to select "begins with” for the second rule.

B2.4.8 Place the cursor in the corresponding “Choose a Filtering Value” field and type: "Set”.

B2.4.9 The “Custom Filter | Subject” dialog box should appear as shown in Figure B2.4 below.

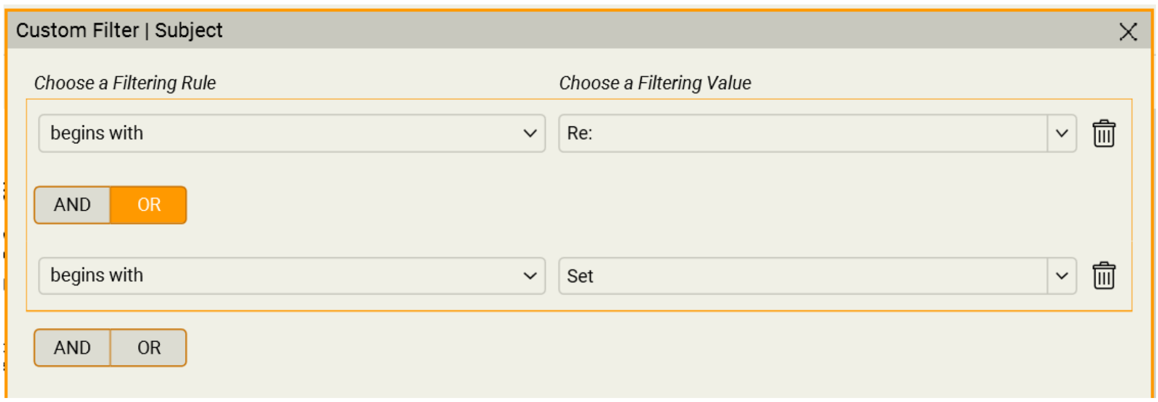

Figure B2.4: Custom Filter Settings

B2.4.10 Click the “Apply” button. The dialog box will close, and the filter will be applied to the “Markups List”.

B2.4.11 Click the “Saved Filters” icon on the right side of the “Filter List” button. In the resulting context menu, place the cursor in the “Saved Filter Name” field.

B2.4.12 Type the name of the filter to be saved. “Stamp Out” or similar is recommended.

B2.4.13 Click the blue button with a check mark symbol. The custom filter settings will be saved under the name entered above.

B2.4.14 Click outside the context menu to close it.

B2.4.15 The saved filter will thereafter be available from the context menu activated by clicking the “Saved Filters” icon when the “Filter List” button is selected.

B2.5 “My Tools” Tool Chest

The “My Tools” tool chest allows users to save frequently used markups. Markups can be added to the “My Tools” tool chest by performing the following actions:

B2.5.1 Create a markup on any document. It is recommended to create the markup in a format matching one of the default tools in the DSA tool chest.

B2.5.2 Right-click on the markup.

B2.5.3 Select “Add to Tool Chest” from the resulting context menu.

B2.5.4 Select “My Tools” from the resulting context sub-menu.

B3. TROUBLESHOOTING IN BLUEBEAM

B3.1 Incorrect Bluebeam Studio Account Username

When the name appearing in the “Attendees” section of the “Studio” tab or the “Author” column in the “Markups List” tab does not match the standard convention defined in Section A1.2.6 above, the EPR Administrator should perform the following actions:

B3.1.1 Open the “Preferences” dialog box by clicking on the “Preferences” button, selecting “Preferences” from the “Revu” pull-down menu, or applying keystroke “Ctrl+K”.

B3.1.2 Click on the “General” left tab and “Options” top tab.

B3.1.3 Verify or correct the content of the “User” field to conform to the convention described in Section A1.2.6 above.

B3.1.4 Click on the “Studio” left tab and “Servers” top tab.

B3.1.5 Verify or correct the content of the “Display Name” field to conform to the convention described in Section A1.2.6 above.

B3.1.6 From an internet browser navigate to signin.bluebeam.com.

B3.1.7 Enter the shared EPR Administrator email address in the “Bluebeam ID” field of the resulting screen and click the “Next” button.

B3.1.8 Enter the EPR Administrator Studio password in the next screen and click the “Sign In” button.

B3.1.9 Click on the “My Profile” tab.

B3.1.10 Verify or correct the content of the “Default Name” field to conform to the convention described in Section A1.2.6 above.

B3.1.11 Click the “Logout” link to exit.

B3.2 Submit Support Ticket to Bluebeam

EPR Administrators can request assistance from Bluebeam technical support for issues they encounter by performing the following actions:

B3.2.1 Select “Technical Support” from the “Help” pull-down menu. A webpage will open in Bluebeam Revu.

B3.2.2 Scroll down to the “Resources and Contact Support” region and click the “Submit a Ticket” button.

B3.2.3 Scroll down to the “Contact Us” region of the webpage and complete all required fields.

B3.2.4 Write a brief description of the issue and problem encountered and complete the reCAPTCHA verification.

B3.2.5 Click the “Send” button to transmit the request to the Bluebeam technical support team.

B3.3 Unable to Send Documents to BSS

When a DSA plan reviewer is unable to send documents to a BSS, the EPR Administrator must open the subject BSP and verify or add the plan reviewer’s email address to the “DSA Direct Employee” group per Section B2.2 above.

APPENDIX C: STANDARDS AND NAMING CONVENTIONS

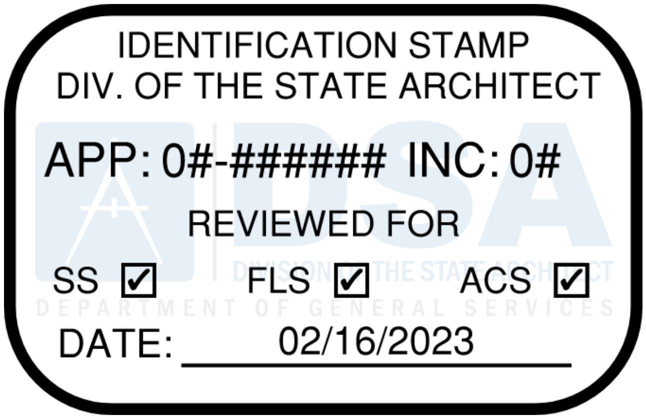

Figure C5.1: Identification Stamp (150%)

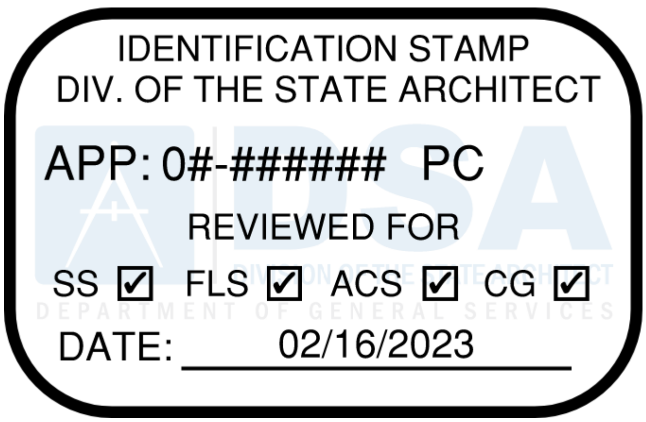

Figure C5.2: Pre-Check (PC) Identification Stamp (150%)

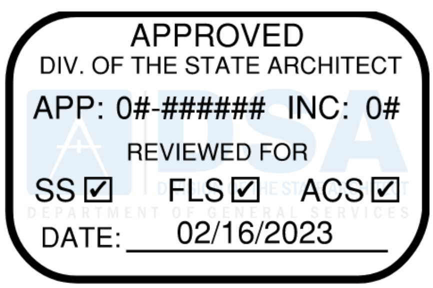

Figure C6.1: Approval Stamp (150%)

ELECTRONIC PLAN REVIEW FOR ADMINISTRATIVE STAFF

Table C1.1: Bluebeam Studio Project (BSP) Folder Structure	
BSP Folders	**Description**
0 Increments	Root folder indicates the number of increments
A. Submission	This is the BSP folder where the DP submits Version 2 (_V2) and greater documents.
1. Plan Review Documents*	
Sub-folders for each Increment as applicable	
2. Post Approval Documents*	
A. Deferred Submittals	
Sub-folders for each Increment as applicable	
B. Revisions	
Sub-folders for each Increment as applicable	
C. Addenda	
Sub-folders for each Increment as applicable	
D. Construction Change Documents	
B. DSA Review	This BSP folder is where DSA places project documents and sends them to sessions (as required) for mark-up.
1. Plan Review Documents*	
Sub-folders for each Increment as applicable	
2. Post Approval Documents*	
A. Deferred Submittals	
Sub-folders for each Increment as applicable	
B. Revisions	
Sub-folders for each Increment as applicable	
C. Addenda	
Sub-folders for each Increment as applicable	
D. Construction Change Documents	
C. Approval	This is the BSP folder where DSA places the approved documents.
1. Plan Review Documents*	
Sub-folders for each Increment as applicable	
2. Post Approval Documents*	
A. Deferred Submittals	
Sub-folders for each Increment as applicable	
B. Revisions	
Sub-folders for each Increment as applicable	
C. Addenda	
Sub-folders for each Increment as applicable	
D. Construction Change Documents	
* BSP used for the review of reports do not include this folder or its sub-folders.	

Table C1.2: Bluebeam Studio Sessions (BSS) Naming and Associated BSP Folder	
BSP Folder	**BSS Name**
Project Without Increments	
B. DSA Review	
1. Plan Review Documents	*RO_APPLNO* Plan Review *Project*
2. Post Approval Documents	
A. Deferred Submittals	*RO_APPLNO* Deferred Submittal *Project*
B. Revisions	*RO_APPLNO* Revision *Project*
C. Addenda	*RO_APPLNO* Addendum *Project*
D. Construction Change Documents	*RO_APPLNO* CCD *Project*
Project With Increments (2 Increment example shown)	
B. DSA Review	
1. Plan Review Documents Increment #1 Increment #2	*RO_APPLNO* INC 01 Plan Review *Project* *RO_APPLNO* INC 02 Plan Review *Project*
2. Post Approval Documents	
A. Deferred Submittals Increment #1 Increment #2	*RO_APPLNO* Deferred Submittal *Project*
B. Revisions Increment #1 Increment #2	*RO_APPLNO* Revision *Project*
C. Addenda Increment #1 Increment #2	*RO_APPLNO* Addendum *Project*
D. Construction Change Documents	*RO_APPLNO* CCD *Project*
Legend: *RO* – Two-digit DSA Regional Office identification number (01: Oakland, 02: Sacramento, 03: Los Angeles, or 04: San Diego) *APPLNO* – Six-digit project application number assigned at registration. *Project* – Project name as recorded in eTracker.	

ELECTRONIC PLAN REVIEW FOR ADMINISTRATIVE STAFF

Table C2.1: Plan Review Document File Naming Convention

	Document Type	**Example Name (Project without Increments)**	**Example Name (Project with Increments: Increment 1 shown)**
Initial Documents with Version 1 (_V1) Identifier	Drawings, typical	DWG_V1	INC 01_DWG_V1
	Drawings, multiple volumes when size exceeds 1 GB	DWG1_V1 DWG2_V1	INC 01_DWG1_V1 INC 01_DWG2_V1
	Specifications	SPC_V1	INC 01_SPC_V1
	DSA 103	103_V1	INC 01_103_V1
	Seismic Mitigation Program (SMP) Phase 1 Eligibility Evaluation Report	EER_V1	Not applicable
	SMP Phase 2 Replacement Analysis Report	RAR_V1	Not applicable
	Evaluation and Design Criteria Report	EDCR_V1	Not applicable
	Supporting Documents	See Table C2.2 below	See Table C2.2 below
	Additional blank pages as required by DSA	DSA Additional Comments	INC 01_DSA Additional Comments
Resubmitted Documents at Back Check with Version 2* (_V2) Identifier	Drawings, typical	DWG_V2	INC 01_DWG_V2
	Drawings, multiple volumes when size exceeds 1 GB	DWG1_V2 DWG2_V2	INC 01_DWG1_V2 INC 01_DWG2_V2
	Specifications	SPC_V2	INC 01_SPC_V2
	DSA 103	103_V2	INC 01_103_V2
	SMP Phase 1 Eligibility Evaluation Report	EER_V2	Not applicable
	SMP Phase 2 Replacement Analysis Report	RAR_V2	Not applicable
	Evaluation and Design Criteria Report	EDCR_V2	Not applicable
	Supporting Documents	See Table C2.2 below	See Table C2.2 below

* All documents submitted after V2 have sequential version numbers

Table C2.2: Plan Review Supporting Document File Naming Convention

Document Type	Example Name (Project without Increments)	Example Name (Project with Increments: Increment 2 example shown)
Structural Calculations	Structural Calcs_V*	INC 02_Structural Calcs_V*
Hydraulic Calculations	Hydraulic Calcs_V*	INC 02_Hydraulic Calcs_V*
Geotechnical Report	Geotechnical Report_V*	Geotechnical Report_V*
Geohazard Report	Geohazard Report_V*	Geohazard Report_V*
Flood Zone Map	FloodZone_V*	FloodZone_V*
Form DSA 1	DSA1_V*	DSA1_V*
Form DSA 1-INC	DSA1-INC_V*	DSA1-INC_V*
Form DSA 1-RUH	DSA1-RUH_V*	DSA1-RUH_V*
Form DSA 1-MR	DSA1-MR_V*	INC 02_DSA1-MR_V*
Form DSA 3	DSA3_V*	INC 02_DSA3_V*
Original drawings of existing construction	A#*RO-APPLNO* Existing Drawings	A#*RO-APPLNO* Existing Drawings
Meeting Minutes (e.g., pre-application meeting, etc.)	MtgMinutes_V*	INC 02_MtgMinutes_V*
CGS Review Letter	CGS_V*	CGS_V*
CGS Acceptance Letter	CGS_A	CGS_A
Product Cut Sheets	CutSheet_*TYPE*_V*	INC 02_CutSheet_*TYPE*_V*
Structural Analysis Model	StructModel _*INFO*_V*	INC 02_StructModel _*INFO*_V*

Legend:

* Sequential version number starting with 1.

RO: DSA regional office identification number (01: Oakland, 02: Sacramento, 03: Los Angles, 04: San Diego). For projects that predate the regional office identification number, use two consecutive underscore characters: "__".

APPLNO: Six-digit project application number. For projects that predate standard six-digit application numbers, add preceding zeros to achieve six-digits.

TYPE: Description of cut sheet content (e.g., "FireAlarm", "DoorHardware", etc.).

INFO: Any constructive designating information (e.g., "BldgA", "Gym", "Canopy", etc.)

Table C2.3: Post Approval Document File Naming Convention

Document Type (Convention)	Example Name (Project without Increments)	Example Name (Project with Increments: Increment 2 example shown)
Addenda (ADD_*ID*_V*)	ADD_01_V1 ADD_01_V2	INC 02_ADD_01_V1 INC 02_ADD_01_V2
	ADD_02_V1 ADD_02_V2	INC 02_ADD_02_V1 INC 02_ADD_02_V2
Revisions (REV_*ID*_V*)	REV_A_V1 REV_A_V2	INC 02_REV_A_V1 INC 02_REV_A_V2
	REV_B_V1 REV_B_V2	INC 02_REV_B_V1 INC 02_REV_B_V2
Deferred Submittals (DS_*Name*_V*)	See Table C2.4 below	See Table C2.4 below
Construction Change Document (CCD_*NUM*_V*)	CCD_001_V1 CCD_001_V2	CCD_001_V1 CCD_001_V2
	CCD_002_V1 CCD_002_V2 CCD_002_V3	CCD_002_V1 CCD_002_V2 CCD_002_V3
	CCD_003_V1 CCD_003_V2	CCD_003_V1 CCD_003_V2

Legend:

* Number sequentially assigned to each new version of submitted post approval document.

ID: Two-digit numeric (e.g., 01, 02, 03, etc.) or one-digit alphabetic (e.g., A, B, C, etc.) sequential designator uniquely assigned to each separate Addendum or Revision.

NUM: Three-digit sequential number (e.g., 001, 002, 003, etc.) uniquely assigned to each separate CCD.

Name: Unique name of each deferred submittal based on subject matter.

Table C2.4: Deferred Submittal Document File Naming Convention		
Deferred Submittal Type	**Example Name (Project without Increments)**	**Example Name (Project with Increments: Increment 2 example shown)**
Access floor systems	DS_Access Floor Systems_V1 DS_Access Floor Systems_V2	INC 02_DS_Access Floor Systems_V1 INC 02_DS_Access Floor Systems_V2
Bleachers	DS_Bleacher_V1 DS_Bleacher_V2	INC 02_DS_Bleacher_V1 INC 02_DS_Bleacher_V2
Elevator Guide Rails	DS_Elevator Guide Rail_V1 DS_Elevator Guide Rail_V2	INC 02_DS_Elevator Guide Rail_V1 INC 02_DS_Elevator Guide Rail_V2
Exterior Wall System	DS_Exterior Wall System_V1 DS_Exterior Wall System_V2	INC 02_DS_Exterior Wall System_V1 INC 02_DS_Exterior Wall System_V2
Fire Pump and Water Tank	DS_Fire Pump and Tank_V1 DS_Fire Pump and Tank_V2	INC 02_DS_Fire Pump and Tank_V1 INC 02_DS_Fire Pump and Tank_V2
Skylights	DS_Skylight_V1 DS_Skylight_V2	INC 02_DS_Skylight_V1 INC 02_DS_Skylight_V2
Stage Rigging	DS_Stage Rigging_V1 DS_Stage Rigging_V2	INC 02_DS_Stage Rigging_V1 INC 02_DS_Stage Rigging_V2
Steel Joist / Joist Girder	DS_Steel Joist_V1 DS_Steel Joist_V2	INC 02_DS_Steel Joist_V1 INC 02_DS_Steel Joist_V2
Window Wall System or Storefront	DS_Window Wall System_V1 DS_Window Wall System_V2	INC 02_DS_Window Wall System _V1 INC 02_DS_Window Wall System _V2
Wood Truss	DS_Wood Truss_V1 DS_Wood Truss_V2	INC 02_DS_ Wood Truss _V1 INC 02_DS_ Wood Truss _V2

Table C3.1: Permission Settings for BSP

Permission	Attendees	DSA Direct Employees
Send Invitations	Allow	Allow
Manage User Access	Deny	Deny
Manage Permissions	Deny	Deny
Send PDFs to Sessions	Deny	Allow
Revoke Check Out	Deny	Deny
Share File Links	Deny	Deny
Full Control	Deny	Deny

Table C3.2: Folder Permission Settings for BSP

Folder	Attendees	DSA Direct Employees
Project Root	Read	Inherit from Parent
# Increment	Inherit from Parent	Inherit from Parent
A. Submission	Read/Write/Delete	Read/Write/Delete
All sub-folders under A. Submission	Inherit from Parent	Inherit from Parent
B. DSA Review	Read	Read/Write/Delete
All sub-folders under B. DSA Review	Inherit from Parent	Inherit from Parent
C. Approval	Read	Read
All sub-folders under C. Approval	Inherit from Parent	Inherit from Parent

Table C3.3: Permission Settings for BSS

Permission	Attendees	DSA Direct Employees
Save As	Allow	Allow
Print	Allow	Allow
Markup	Allow	Allow
Markup Alert	Allow	Allow
Add Documents	Deny	Allow
Full Control	Deny	Deny

APPENDIX D: CHECKLISTS

Checklist D1: Plan Review Document Preparation Verification

The EPR Administrator shall verify the documents submitted by the DP comply with the preparation criteria required by PR 18-04. The EPR Administrator shall notify the DP of any cases of noncompliance. Cases of noncompliance must be corrected by the DP before uploading files to the BSS and proceeding with the plan review. If filenames do not match the convention given in Table C2.1 above, the EPR Administrator may correct the filename.

Verify the DWG_V1.pdf file complies with the following:

- ☐ File Size: Right-click the filename in BSP and select "Properties…" from the resulting context menu to show file properties. The file must not exceed 500 MB. A single PDF file is required unless one file would exceed 500 MB.
- ☐ Bookmarks: Confirm in the "Bookmarks" tab that bookmarks have been created with page number and sheet name. Verify bookmarks are nested in accordance with the sheet index on the drawings. Audit bookmarks to confirm there are no broken links and spot check the accuracy of a few bookmark links.
- ☐ Labels: Confirm in the "Thumbnails" tab that page labels have been created with page number and sheet name.
- ☐ Flattened: Confirm the document has been flattened by verifying there are no items in the "Markups List" tab.
- ☐ Layers: Confirm in the "Layers" tab that there are no layers.
- ☐ Sheet Count: Confirm the drawings have a sheet index and verify its sheet count matches the number of pages in the file as reported on the bottom of the Revu interface.
- ☐ Scanned Documents: Select random sheets from the "Bookmarks" tab (a minimum of two from each nested section) and verify their regeneration speed is not greater than two seconds.

Verify the SPC_V1.pdf, EDCR_V1, EER_V1, or RAR_V1 file complies with the following:

- ☐ Single File: Confirm the document is a single file in PDF format.
- ☐ Bookmarks: Confirm in the "Bookmarks" tab that bookmarks have been created for each section in accordance with the table of contents. Audit bookmarks to confirm there are no broken links and spot check the accuracy of a few bookmarks.
- ☐ Flattened: Confirm the document has been flattened by verifying there are no items in the "Markups List" tab.

Verify the 103_V1.pdf file complies with the following:

- ☐ Flattened: Confirm the document has been flattened by verifying there are no items in the "Markups List" tab.

Verify Supporting Documents in PDF file format (e.g., cut sheets, structural calculations, hydraulic calculations, geotechnical reports, existing drawings etc.) comply with the following:

- ☐ Bookmarks: For files more than 25 pages in length, confirm in the "Bookmarks" tab that bookmarks have been created. Audit bookmarks to confirm there are no broken links and spot check the accuracy of a few bookmarks.
- ☐ Flattened: Confirm the document has been flattened by verifying there are no items in the "Markups List" tab.

Checklist D2: Status Menu Validation

The LPR shall validate the proper operation of the “DSA Back Check” menu for each file added to the BSS. The validation steps and corrective action (as applicable) described below must be performed prior to adding the document to the BSS.

Perform the following steps separately for the DWG_V1.pdf, SPC_V1.pdf, 103_V1.pdf, EDCR_V1.pdf, EER_V1.pdf, and RAR_V1.pdf. Check out the file in accordance with Section B1.3 above.

- ☐ Place the standard TEST MARK markup from the “Tool Chest” tab just beyond and off the top edge of the first sheet of the document.
- ☐ Right click on the TEST MARK markup and select “Set Status” from the resulting context menu.
  - If the “DSA Back Check” status menu is confirmed, proceed to the next step.
  - If the “DSA Back Check” status menu is absent, perform Corrective Action #1 below.
- ☐ From the “DSA Back Check” status menu select “INCORPORATED”.
  - If the color of the TEST MARK changes to green, the status menu is functioning properly, and validation is complete for this file.
  - If the color of the TEST MARK does not change to green, perform Corrective Action #2 below.

The following corrective actions require access to the “Manage Status” dialog box. The “Manage Status” dialog box can be opened by performing the following steps:

- Open the “Markups List” tab.
- From the pull-down menu in the “Markups List” title select “Columns”.
- From the resulting context menu select “Status” (if it is not already selected). The “Status” column will now be visible in the "Markups List” tab.
- Click on the “Settings” icon, which appears on the right side of the “Status” column heading.
- From the resulting context menu select “Manage Status”. The “Manage Status” dialog box will open.

Corrective Action #1:

- ☐ Open the “Manage Status” dialog box as described above.
- ☐ Delete all foreign status menus by selecting the foreign menu in the “Models” field and clicking the red “X” button. Note: The “Review” and “Migration” models are Bluebeam default status menus and need not be deleted.
- ☐ Click the “OK” button to close the “Manage Status” dialog box.
- ☐ Save the file by applying keystroke “Ctrl+S”.
- ☐ Reopen the “Manage Status” dialog box and confirm all foreign models are removed and “DSA Back Check” is selected as the active status menu.
- ☐ Return to and repeat the second step of the status menu validation process above.

Corrective Action #2

- ☐ Open the “Manage Status” dialog box as described above.
- ☐ Select the “DSA Back Check” status menu in the “Models” field.
- ☐ Double-click “INCORPORATED” in the “States” field. The “State Properties” dialog box will appear. Modify the “State Properties” dialog box as follows:
  - ☐ Select the check box left of “Color”.
  - ☐ Click the button to the right of “Color”. At the bottom of the resulting context palette, click the black triangle to expand the dialog box. Enter “339966” into the “#” field. Click the “OK” button to close the dialog box.
- ☐ Double-click “OPEN (DSA USE ONLY)” in the “States” field. The “State Properties” dialog box will appear. Modify the “State Properties” dialog box as follows:
  - ☐ Select the check box left of “Color”.
  - ☐ Click the button to the right of “Color”. At the bottom of the resulting context palette, click the black triangle to expand the dialog box. Enter “FF0000” into the “#” field. Click the “OK” button to close the dialog box.
- ☐ Double-click “CLOSE (DSA USE ONLY)” in the “States” field. The “State Properties” dialog box will appear. Modify the “State Properties” dialog box as follows:
  - ☐ Select the check box left of “Color”.
  - ☐ Click the button to the right of “Color”. At the bottom of the resulting context palette, click the black triangle to expand the dialog box. Enter “999999” into the “#” field. Click the “OK” button to close the dialog box.
- ☐ Double-click “ADDITIONAL REVIEW REQUIRED (DSA USE ONLY)” in the “States” field. The “State Properties” dialog box will appear. Modify the “State Properties” dialog box as follows:
  - ☐ Select the check box left of “Color”.
  - ☐ Click the button to the right of “Color”. At the bottom of the resulting context palette, click the black triangle to expand the dialog box. Enter “800080” into the “#” field. Click the “OK” button to close the dialog box.
- ☐ Click the “OK” button to close the “Manage Status” dialog box.
- ☐ Return to and repeat the third step of the status menu validation process above.

Checklist D3: Post Approval Document Preparation Verification

The EPR Administrator shall verify the documents submitted by the DP comply with the following preparation criteria as required by PR 18-04. The EPR Administrator shall notify the DP of any cases of noncompliance. Cases of noncompliance must be corrected by the DP before uploading files to the BSS and proceeding with review of the post approval document.

Verify the approval document file complies with the following:

- ☐ File Size: Right-click the filename in BSP and select “Properties…” from the resulting context menu to show file properties. The file must not exceed 500 MB. A single PDF file is required unless one file would exceed 500 MB.
- ☐ Bookmarks: Confirm in the “Bookmarks” tab that bookmarks have been created for the following elements. Audit bookmarks to confirm there are no broken links and spot check the accuracy of a few bookmarks.
  - ☐ Form DSA 140.
  - ☐ First page of the narrative (if applicable).
  - ☐ Each page of drawings with sheet number and sheet name (if applicable). Verify bookmarks are nested when the document contains more than 25 drawing sheets.
  - ☐ First page of each specification section (if applicable).
- ☐ Flattened: Confirm the document has been flattened by verifying there are no items in the “Markups List” tab.
- ☐ Layers: Confirm in the “Layers” tab that there are no layers.

Verify the supporting document file complies with the following:

- ☐ Bookmarks: For files more than 25 pages in length, confirm in the “Bookmarks” tab that bookmarks have been created. Audit bookmarks to confirm there are no broken links and spot check the accuracy of a few bookmarks.
- ☐ Flattened: Confirm the document has been flattened by verifying there are no items in the “Markups List” tab.