Oracle
Primavera
Bluebeam User Guide

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Oracle Primavera Bluebeam User Guide

Primary Author: Oracle Corporation

Contents

Overview

Bluebeam is a markup and collaboration tool that is widely used by customers throughout the world. Its main products are Revu and Studio Prime. While Revu allows customers to create collaborative sessions in which users can bring in multiple documents and review them together, Studio Prime has more advanced features like the ability to create/manage documents within folders, create projects and add collaborative document review sessions within them. Within Unifier, users can send their documents and files to Bluebeam for review sessions. Users can bring the reviewed files and markup comments back into the application to take the next appropriate actions.

The Bluebeam admin must complete steps to assist in the initial setup and configuration of Bluebeam as an integrated collaborative third party program within the Unifier Environment. These steps include the Bluebeam admin taking the following actions:

- ▸ Enabling Bluebeam integration
- ▸ Filing a service request with Oracle Support for OAuth authentication
- ▸ Add Unifier Application into Bluebeam account

Note: Bluebeam documentation is the most accurate reflection of the Bluebeam software. The Bluebeam searchable knowledge base is available by way of the following link: https://support.bluebeam.com/.

Setting up Bluebeam

To set up Bluebeam in Unifier:

1. Sign into Unifier.
2. Click the **Company Workspace** tab (**Admin** mode).
3. From the left-hand Navigator, click the **Integration** node.
4. Click the **Bluebeam** sub-node.
5. In the **General** tab, under **Enable Integration?**, select **Yes**. When the integration is enabled a **Client ID** will be displayed which will be used when configuring the integration within Bluebeam.
6. As part of the authentication, you need to capture the URLs that will be used for Bluebeam integration by filing a service request with Oracle Support that includes the URLs of all the environments that will have the integration enabled.
7. Click **Save**.

To set up Unifier in Bluebeam:

1. Sign into Bluebeam.
2. Select **Integrations**.
3. Enter the **Client ID** from the **Bluebeam** sub-node and choose **Lookup**.
4. Click **Save**.
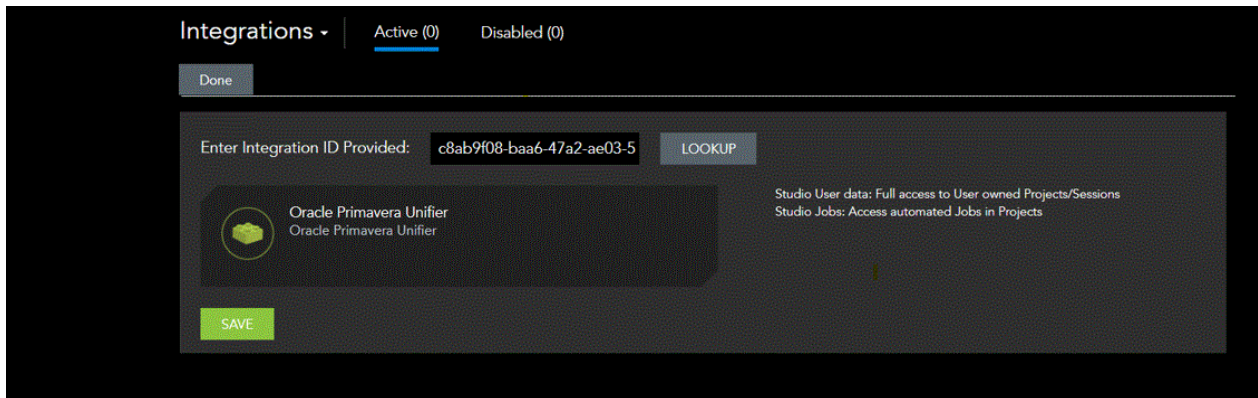
Note: The Unifier user must have an active Bluebeam Studio Prime subscription.

Setting up Markups and Comments in Bluebeam

To Set up Markups and Comments in Bluebeam:

1) Sign into Unifier.
2) Click the **Company Workspace** tab (**Admin** mode).
3) From the left-hand Navigator, click the **Integration** node.
4) Click the **Bluebeam** sub-node.
5) In the **Comments** tab, check the **Enable creation of Line Items from Comments of the Review Session** checkbox. When this option is checked, line items will be created in the business process records that have the fields to capture Bluebeam Review comments. Line Items can only be created after the Bluebeam Attributes are mapped to Unifier Data Elements. Upon checking the **Enable creation of Line Items from Comments of the Review Session** checkbox, the Attribute Mapping block and the Condition setup block appear.
6) To map attributes:
    a. Click **Add.**
    b. In the **Bluebeam Attribute** column, enter the name of the Bluebeam attribute from Bluebeam Revu
    c. In the **Bluebeam Attribute Sub-Type** column, select the subtype from the dropdown menu.
    d. In the **Unifier Data Element** column, select the data element from the dropdown menu.
7) To add a condition:
    a. Type an attribute into the **Bluebeam Attribute** field.
    b. Next, select equals or does not equal from the dropdown menu in the middle column.
    c. Enter a comment in the **Value** field.
8) Click **Save**

Tip:

Line items can only be populated with attributes that are present in the Bluebeam markup list. To determine the attribute name, you can try a few sample runs in staging.

- ▸ Create a Bluebeam session in Unifier with a PDF.
- ▸ Review using Bluebeam Revu with all possible markups.
- ▸ Once the session owner finalizes the session, the markup files are available in the **Received Files** tab. You can download the file by selecting the **Gear** icon and choosing the **Download JSON File** option.

The attributes in JSON are as obtained from Bluebeam and can be used a reference for the Bluebeam attributes in the **Comments** tab.

View and Configure Permissions

Users with **Configure** permissions can:

▶ Edit the **Comments** tab
▶ Edit the **Unifier Data Element** column
▶ Add new rows in the grid
▶ Delete newly added rows

Users with **View** permission can view the page but cannot make any changes.

To edit Configure and View permissions:

1) Navigate to **Access Control > Integration > Bluebeam**
2) To Add User permissions:
    a. Click **Add.** The Permissions Setting window opens.
    b. Click Add **Users/Groups.** The User/Group Picker window opens.
    c. Select Users or Groups and click **Add.**
    d. Click **OK**.
    e. In the Permissions Setting window, check the box next to **Configure** or **View.**
        ▪ Users with Configure permissions can edit the **Comments** tab, edit the **Unifier Data Element** column, add new rows in the grid, and delete newly added rows.
        ▪ Users with View permission can view the page but cannot make any changes.
3) To Modify User permissions:
    a. Check the box next to the user you want to modify.
    b. Click **Modify**. The Permissions Setting window opens.
    c. In the Permissions Setting window, check the box next to **Configure** or **View.**
4) To Remove User permissions:
    a. Check the box next to the user you want to modify.
    b. Click **Remove**.

Setting up Permissions for End Users to Access Bluebeam Studio Sessions

Bluebeam Studio Sessions node will allow users to create new Bluebeam Studio sessions and see a log of all ongoing Bluebeam Studio sessions existing for the files in the Document Manager and for business process record attachments.

To set permissions for Bluebeam Users:

1) Go to **Company Workspace** tab, **Admin** mode.
2) Open the **User Administration** grouping node and click **Access Control** node to open the Access Control log.
3) Click **User Mode Access** to expand.
4) Click **User Administration** to expand.
5) Click **Company Workspace** or **Shells / Projects (Standard)** to expand.
6) Click **Document Manager** to expand.
7) Click **Bluebeam Studio Sessions**.

> **Note**: The location of the Bluebeam Studio Sessions is dependent on the setup of the User Mode Navigator.

You can assign the following permissions:

Permission	Expected Behavior When Checked
Create	A user with the "Create" permission will have the ability to: ▶ Create a Bluebeam studio session ▶ View and edit the **Bluebeam Studio Sessions** log and its details ▶ Perform actions such as Finalize, Get Review Status, Assign Full Control permission to a reviewer, and so on
View	A user with the "View" permission will have the ability to: ▶ View the **Bluebeam Studio Sessions** log and its details

Bluebeam Studio Sessions in Document Manager and Business Processes Records

You can create Bluebeam studio sessions only if your company has decided to enable integration with Bluebeam in the Company Workspace > Integration > Bluebeam node.

> **Note**: Only PDF files may be selected and sent for a Bluebeam Review Session.

In This Section

Creating and Viewing Bluebeam Studio Session in Document Manager

You can initiate a Bluebeam studio session for files that are stored in Unifier's **Document Manager**. The steps to create the review session will be the same for both **Company Documents** and project **Documents**.

> **Notes:**
>
> - When a Bluebeam session with files is created in Unifier, these files can also be viewed in Bluebeam Revu as they are associated with a Bluebeam Project. Ensure that you do not delete the project in Bluebeam Revu or Bluebeam portal as this will cause the session to fail in Unifier. Unifier will not be able to return the markup documents if the project is deleted.
>
> - Bluebeam sessions created in Unifier should be finalized only in Unifier and not in Bluebeam Revu. The "Received" files, that is, the markup documents, will be available only if the corresponding session is finalized from Unifier.

To create a Bluebeam studio session in the **Company Documents** or **Documents** sub-node:

1) Click the **Company Workspace** tab or project or shell tab, **User** mode.
2) Click the **Document Manager** to expand.
3) Click **Company Documents** or **Documents**.
4) There are two methods to initiate a Bluebeam studio session in **Company Documents** or **Documents**:

> ▸ To initiate a review session for a single file, click the gear menu (⚙) or right click a document to send for review and select **Initiate Bluebeam Studio Session**.

> ▸ To initiate a review session for multiple files, click the tool bar option ✎ .

5) Upon creation, login into your Bluebeam account.   Note, you must use the same Bluebeam account going forward.
6) If it is the first time, you will be prompted to grant access to your Studio data by clicking **Allow**.
7) **Create Bluebeam Studio Session** will open.
8) Additional files may be added by clicking **Add Files**.

Select Files Window

After clicking **Add Files** in the **Create Bluebeam Studio Session** window from the **Document Manager**, the **Select Files** window will open. Select the files you wish to add to the Bluebeam studio session, and when you are done selecting click **Select**.

The **Select Files** window toolbar options:

Search	Enables you search for a file.
Find on Page	Enables you to activate the find cells for each column in order to find a particular item.

The **Select Files** window contains the following columns:

Name	The name of the file.
Comments	The associated comments of the file.
Bluebeam Session Status	The Bluebeam session status of the file.
Location	The location of the file.
Owner	The name of the user that owns the file.
Title	The title of the file.
Revision No.	The revision number of the file.
Issue Date	The date the file was issued.
Size	The size of the file.

After inputting the required **Session Name** and the associated user or users in **To**, click **Create Session**.

> **Note**: At any given point in time, a document may only be included in one active Bluebeam studio session.
>
> Any user who can view the document can initiate a Bluebeam Studio session.

After you create a Bluebeam studio session, the status of the document that has been added to the Bluebeam studio session will show Active (under the Bluebeam Session Status column), in the **Company Documents** or **Documents** sub-nodes of the **Document Manager**. The created session will be displayed in the **Bluebeam Studio Sessions** node (log) where you can use the gear menu (or right-click) to:

    a. **Open in Bluebeam Revu**, or

Finalize the session.

Bluebeam Log Tab in Document Manager

The **Bluebeam Log** tab seen in the right pane of Document Manager allows you to view details of the Bluebeam studio session associated with the selected file.

To access the **Bluebeam Log** tab in a file in document manager:

    1. Click the **Document Manager**.

Click **Company Documents** or **Documents**.

    1. Select a File and click the **Bluebeam Log** tab in the right pane.

The **Bluebeam Log** tab toolbar options:

- **Find on Page**
- **Refresh**

The **Bluebeam Log** tab contains the following columns:

Status	The review status of the Bluebeam studio session of the sent file.
Sent File Name	The name of the sent file.
Rev. No	The revision number of the sent file.
Pub. No	The publishing number of the sent file.
Received File Name	The name of the received file. Field will have a value only when the Bluebeam Studio session is finalized.

Session ID	The ID of the Bluebeam studio session.
Session Name	The name of the Bluebeam studio session.
Last Updated By	The name of the user that performed the last action for the Bluebeam studio session.
Last Updated	The date and time of when the last action was performed for the Bluebeam studio session.

The gear menu for each file contains the following options:

When the session is still active

‣ **Finalize**

‣ **Get Session Status**

When the session is finalized

‣ **Download Markup File**

‣ **Download JSON File**

Note: Any user who has access to the file will be able to see the files returned from Bluebeam. These are the Markup File and the JSON file.

> You can get the session details by clicking the hyperlink associated with the Session ID. This hyperlink will only be available for an Active session.

Creating and Viewing a Bluebeam Studio Session in a Business Process Record

You can review all the attachments in a business process record using Bluebeam Studio Session.

> **Notes:**
>
> ▪ When a Bluebeam session with files is created in Unifier, these files can also be viewed in Bluebeam Revu as they are associated with a Bluebeam Project. Ensure that you do not delete the project in Bluebeam Revu or Bluebeam portal as this will cause the session to fail in Unifier. Unifier will not be able to return the markup documents if the project is deleted.
>
> ▪ Bluebeam sessions created in Unifier should be finalized only in Unifier and not in Bluebeam Revu. The "Received" files, that is, the markup documents, will be available only if the corresponding

session is finalized from Unifier.

To create a Bluebeam studio session in a business process of workflow and non-workflow type:

1) Open the BP record containing the attachments that need to be reviewed.

2) On the top-right of the screen, click the Menu drop-down (three horizontal lines icon), navigate to Review, and click Bluebeam Studio Session Review.

> **Note**: A Bluebeam studio session can be created only when the record is in Edit mode. The option to create a session will not be available in the **Creation** step. You can initiate a review session for Terminal records with an Action form in the **End** step.

3) Upon creation, login into your Bluebeam account. Note, you must use the same Bluebeam account going forward.

4) If it is the first time, you will be prompted to grant access to your Studio data by clicking **Allow**.

5) **Create Bluebeam Studio Session** will open.

6) Additional files may be added by clicking **Add Files**.

Add Files Window

After clicking Add Files in the Create Bluebeam Studio Session window from a business process record, the Add Files window will open. The list of files seen here are either from the upper form or from the line items. Files from a hidden tab will not be seen. Select the files you wish to add to the Bluebeam studio session, and when you are done selecting click Add.

The Add Files window contains the following columns:

File Name	The name of the file.
Title	The title, if any, associated with the file.
Pub. No.	The publishing number, if applicable, associated with the file.
Tab Name	The name of the tab if the file is present in a line item attachment.
Size	The size of the file.

After inputting the required **Session Name** and the associated user or users in **To**, click **Create Session**.

> **Note**: At any given point in time, a business process record can have only one active Bluebeam studio session.

For a **workflow** business process record, if you accept the task, initiate a Bluebeam studio session, and then later do an 'Undo Accept Task' action, the session will still remain.

After you create a Bluebeam studio session, the status of the attachment that has been added to the Bluebeam studio session will show Active (under the Bluebeam Session Status column), in the **Attachments grid**. Additionally, the created session will be displayed in the **Bluebeam Studio Sessions** log where you can use the gear menu (or right-click) to:

    a. **Open in Bluebeam Revu**, or

    b. **Finalize** the session

Bluebeam Log Tab in Business Process Record

When the Attachments tab is expanded in the business process record, and if the file has a Bluebeam studio session, then you will see the **Bluebeam Log** tab next to the **Preview** tab in the right pane. The **Bluebeam Log** tab seen in the right pane of **Attachments** tab allows you to view details of the Bluebeam studio session associated with the selected attachment.

To access the **Bluebeam Log** tab in a file in **Document Manager**:

1. Click the **Attachments** tab.

2. Click the ⌞⌟ in the right pane.

3. Select an attachment and click the **Bluebeam Log** tab in the right pane.

The **Bluebeam Log** tab toolbar options:

    ▸ **Find on Page**

    ▸ **Refresh**

The **Bluebeam Log** tab contains the following columns:

Status	The status of the Bluebeam studio session of the sent file.
Sent File Name	The name of the sent file.
Rev. No	The revision number of the sent file.
Pub. No	The publishing number of the sent file.
Received File Name	The name of the received file.
Session ID	The ID of the Bluebeam studio session.
Session Name	The name of the Bluebeam studio session.
Last Updated By	The name of the user that performed the last action for the Bluebeam studio session.

Last Updated	The date and time of when the last action was performed for the Bluebeam studio session.

The gear menu for each file contains the following options:

When the session is still active

- ▶ **Finalize**
- ▶ **Get Session Status**

When the session is still finalized

- ▶ **Download Markup File**
- ▶ **Download JSON File**

> **Note:** Any user who has access to the file will be able to see the files returned from Bluebeam. These are the Markup File and the Markup JSON file.
>
> You can get the session details by clicking the hyperlink associated with the Session ID. This hyperlink will only be available for an Active session.

Bluebeam Studio Sessions Log

The **Bluebeam Studio Sessions** sub-node will capture all the Bluebeam studio sessions that are present at the given level. At the Company Workspace level, this node will capture all the Bluebeam studio sessions initiated from Document Manager (DM), BP record attachments, and Bluebeam Studio Sessions. When you click the **Bluebeam Studio Sessions** sub-node (**Company Workspace** or Project or Shell > **User** mode > **Document Manager**), the **Bluebeam Studio Session** log opens which displays the Bluebeam studio sessions within the **Company Workspace** or **Project/Shell**. The log has the following elements:

‣ Toolbar
‣ Grid displaying the list of all the Bluebeam studio sessions within the **Company Workspace** or **Project/Shell**
‣ Right-hand pane capturing the details of each Bluebeam studio session

The **Bluebeam Studio Sessions** log toolbar options:

Create	Enables you to create a Bluebeam studio session. This option will be available only if you have the required permission.
View	Enables you to set the view of the log through selecting one of these options or creating your own view: ‣ **All** ‣ **Group by Status** ‣ **Created by Me** ‣ **Create New View** ‣ **Manage Views**
Edit View	Enables you to edit your currently selected view.
Refresh	Enables you to update the information of the items listed on the log.
Print	Enables you to: ‣ **Print** ‣ **Export To CSV** ‣ **Export To Excel**
Find on Page	Enables you to activate the find cells for each column in order to find a particular item.

The **Bluebeam Studio Sessions** log grid column headings:

‣ **Session ID**
‣ **Session Name**
‣ **Status**
‣ **Session Start Date**

- **Session End Date**
- **Source**
- **Last Updated**
- **Lasted Updated By**
- **Creator**

> **Note**: The **Bluebeam Studio Sessions** node, at the company-level, includes session details that have initiated from within the business process attachments.

The **Bluebeam Studio Sessions** log tabs (right-hand pane), when you select a Bluebeam studio session:

- **Sent Files** tab
- **Reviewers** tab
- **Received Files** tab
- **Finalize History** tab

To open a Bluebeam studio session, you can double-click on the Bluebeam studio session or click the gear menu and select **Open Bluebeam Session**. Once you open a Bluebeam Session, the **Bluebeam Session** overlay opens.

In This Section

Creating a Bluebeam Studio Session in Bluebeam Studio Sessions

Notes:

- When a Bluebeam session with files is created in Unifier, these files can also be viewed in Bluebeam Revu as they are associated with a Bluebeam Project. Ensure that you do not delete the project in Bluebeam Revu or Bluebeam portal as this will cause the session to fail in Unifier. Unifier will not be able to return the markup documents if the project is deleted.

- Bluebeam sessions created in Unifier should be finalized only in

Unifier and not in Bluebeam Revu. The "Received" files, that is, the markup documents, will be available only if the corresponding session is finalized from Unifier.

To create a Bluebeam studio session in the **Bluebeam Studio Sessions** node:

1. Click the **Company Workspace** tab or **Project/Shell**.
2. Click the **Document Manager** to expand.
3. Click **Bluebeam Studio Sessions**.
4. Click **Create**.
5. Upon creation, login into your Bluebeam account. Note, you must use the same Bluebeam account going forward.
6. If it is the first time, you will be prompted to grant access to your Studio data by clicking **Allow**.
7. **Create Bluebeam Studio Session** will open.
8. One or more files must be added by clicking **Add Files**. The files listed here are from the **Document Manager**.
9. After inputting the required **Session Name** and the associated user or users in **To**, click **Create Session**.

Note: At any given point in time, a document may only be included in one active Bluebeam studio session.

Create Bluebeam Studio Session Window

The **Create Bluebeam Studio Session** window, left-hand, the following fields are displayed:

Session Name	The name of the Bluebeam studio session.
To	The user or users that are associated with the Bluebeam studio session. These users can join the session in Bluebeam Revu.
External Users	The user or users outside of Unifier that are associated with the Bluebeam studio session. These users can join the session in Bluebeam Revu.
Message (Optional)	Any additional descriptions, notes, reminders and so on.
Session End Date	The intended date for the Bluebeam studio session to end.
Source	The origin of where the document was added from.

The **Create Bluebeam Studio Session** window, right-hand, contains the **Review Files** tab. This tab contains the following fields:

Name	The name of the document.
Title	The title of the document.
Size	The byte size of the document.
Location	The folder location of the document.

Opening a Bluebeam Studio Session in Bluebeam Revu

To open a Bluebeam studio session in Bluebeam Revu:

1) Click the **Company Workspace** tab or **Project/Shell**.
2) Click the **Document Manager** to expand.
3) Click **Bluebeam Studio Sessions**.
4) Click the gear menu or right click the session to review and select **Open in Bluebeam Revu**.
5) The Bluebeam Session will open and the files added to the session can be viewed.

> **Note**: The option to **Open in Bluebeam Revu** is available only for the studio session creator and reviewers.

Editing a Bluebeam Studio Session

To edit an active Bluebeam studio session:

1. Click the **Company Workspace** tab or **Project/Shell**.
2. Click the **Document Manager** to expand.
3. Click **Bluebeam Studio Sessions**.
4. Double click to open the session
5. The Bluebeam Session will open
6. You can edit the session to add/remove files, add/remove reviewers, change the end date etc.

The existing **Bluebeam Studio Sessions** window, left-hand, the following fields are displayed:

Session ID	The ID of the Bluebeam Studio session. This field cannot be edited.
Session URL	The URL of the Bluebeam Studio session. This field cannot be edited.
Session Name	The name of the Bluebeam studio session. This cannot be edited.
To	The user or users that are associated with the Bluebeam studio session. These users can join the session in Bluebeam Revu.
External Users	The user or users outside of Unifier that are associated with the Bluebeam studio session. These users can join the session in Bluebeam Revu.
Message (Optional)	Any additional descriptions, notes, reminders and so on.
Session End Date	The intended date for the Bluebeam studio session to end.
Source	This will either display Document Manager or the business process name and record number.

The existing **Bluebeam Studio Sessions** window, right-hand, contains the **Review Files** tab. This tab contains the following fields:

Name	The name of the document.
Title	The title of the document.
Size	The byte size of the document.
Location	The folder location of the document. This option is seen when the session is for files from **Document Manager**.
Tab Name	The location of the attachment. This options is seen when the session is for attachments from a business process record.

Finalizing a Bluebeam Studio Session

You can finalize the Bluebeam Studio session after the review is complete. After a session is finalized, the files that are part of the session will be sent back to Unifier and can be viewed in the **Received Files** tab. To finalize a Bluebeam studio session:

1) Click the **Company Workspace** tab or **Project/Shell**.
2) Click the **Document Manager** to expand.
3) Click **Bluebeam Studio Sessions**.
4) Click the gear menu or right click the session and select **Finalize**.
5) Upon Finalizing, the status of the session and all associated documents will change from Active to Finalized (under the Bluebeam Session Status column).

> **Note**: Only active Bluebeam studio sessions may be finalized. The option to **Finalize** is only available to the studio session creator or a reviewer with Full Control permission.

For Bluebeam sessions initiated in the **Document Manager** > **Documents** node, and by way of the **Bluebeam Studio Session** node, you can download the sent and received files if you have "Download" access to the files used to create session.

For Bluebeam sessions initiated in a Business Process record, you will have "Download" access only if you have one of the following:

- You must have at least the **View** permission for the Business Process record.
- You are a part of the Business Process workflow (as an assignee). In this scenario, the Business Process record is a Workflow Business Process.

Deleting a Bluebeam Studio Session

To delete a Bluebeam studio session:

1) Click the **Company Workspace** tab or **Project/Shell**.
2) Click the **Document Manager** to expand.
3) Click **Bluebeam Studio Sessions**.
4) Click the gear menu or right click the session and select **Delete in Bluebeam**.
5) Upon deleting, the status of the session and all associated documents will change from Active to Deleted in Bluebeam (under the Bluebeam Session Status column).

> **Note**: Only active Bluebeam studio sessions may be deleted in Bluebeam.

Working with Log Views

Use the **View** drop-down list to customize the Bluebeam Studio Sessions log to display files based your filter criteria. You can use the following pre-defined views or create your own view:

- **All**
- **Group by Status**
- **Created by Me**
- **Create New View**
- **Manage Views**

If the option **DM View** is available, it enables you to see the views defined in Log views, in Document configuration, at runtime. In such scenario, you can only see the active views at runtime, and you can see all active views pertaining to the **Documents** log, if you who have permission to access to the DM log.

To create a new view:

1) Go to your **Bluebeam Studio Sessions** log.
2) Click the **View** drop-down list and select **Create New View** to open the **New View** page.
3) On the **New View** page, enter a name for your new view under the field **Save View As**.
4) In the **Columns** tab, select columns that you want to display.
5) Select the columns that you want to remain static on the page from: **Lock after selected Column** drop-down list.

   In addition to arranging the columns, you can go to the **Filters**, **Group By**, and **Sort By** tabs to customize the new view by applying more refined selections.
6) Click **Save** to create your new view.

Your new view appears in **View** drop-down list.

To manage your views:

1) Go to your **Bluebeam Studio Sessions** log.
2) Click the **View** drop-down list and select **Manage Views** to open the **Manage Views** window.

   Use the **Manage Views** to create, delete, or hide views within any log. In addition, you can reorder views by dragging and dropping them in the **Manage Views** window.
3) When finished, click **Apply**.

Your arrangement appears in the View drop-down list.

To edit or delete an existing view:

1) Go to your **Documents** log.
2) Click the **Edit View** (✎) icon.

> **Note**: If you modify the view and do not save the changes, the system keeps the existing name and adds the word "Modify" to the existing name.

3) You can edit the view of the following elements on your log:
‣ Columns
‣ Filters
‣ Group By
‣ Sort By
1) Click **Apply** when you have finished editing.

Finding on Page

The **Find on Page** option enables you to find items on the displayed page.

1) Click the **Find on Pag** 🔍 icon. The system inserts a new row that enables you to enter your search parameters.
2) Enter your search parameters.

The system displays a list of files, folders, subfolders, or shortcuts that match the criteria you entered.

If you decide to cancel the find for one of cell, then you must remove the parameters that you have entered. If you decide to cancel the find for an entire row, then you must click 🔍 **Find on Page**.

Sorting Columns

You can sort columns in the **Bluebeam Studio Sessions** log and the Search Results page. The **View** menu, is prefixed with the word *Modified* if the sort is applied to the columns.

To sort columns, click the up and down arrows next to the column name.

Bluebeam Studio Sessions Log Properties Tabs

Within the **Bluebeam Studio Sessions** sub-node and upon selecting a Bluebeam studio session, you can view the following properties tabs:

Sent Files tab

This tab will show a list of all the documents that were added by the studio session creator while initiating the Bluebeam studio session. This tab contains the following toolbar options:

‣ **Download all files as Zip file**
‣ **Print (Export To CSV and Export to Excel)**
‣ **Find on page**

The **Sent Files** tab contains the following columns:

File Name	The name of the sent file.
Rev. No	The revision number of the sent file.
Pub. No	The publishing number of the sent file.
Title	The title of the sent file.
Size	The size of the sent file.
Location	The folder location of the sent file.

The gear menu for each file contains the following options:

▸ **Open**
▸ **Download**

Reviewers tab

This tab will show the list of all the reviewers added to the session. The list will include both Unifier users as well as external users.

For external users, the Review name will include the email address till the time that system can fetch the User Name of the reviewer. This tab contains the following toolbar options:

▸ **Print (Export To CSV and Export to Excel)**
▸ **Find on Page**

The **Reviewers** tab contains the following columns:

Reviewer Name	The name of the reviewer.
Review Status	The status of the review by the reviewer.
Permissions	The permissions of the reviewer.
Reviewer Status	The status of the reviewer.

The **Received Files** tab will show a list of all the reviewed documents and comments/markup files once the session is finalized or archived.   The gear menu for each item contains the following option:

▸ **Assign Full Control Permission**

Gear options of "Assign Full Control Permission" (For users who have Mark up permission can be assigned Full control permission by clicking on gear) "Assign Mark up Permission" (For users who have full control permission can be assigned full markup permission) will be seen. The gear option is only seen for the studio session creator.

To assign full control permission on a document in Bluebeam:

I. Click the **Company Workspace** tab or **Project/Shell**.

2. Click the **Document Manager** to expand.

3. Click **Bluebeam Studio Sessions**.

4. Select the Bluebeam studio session in which you wish to assign full control permission to a user.

5. In the right-hand pane, click the **Reviewers** tab.

6. Click the gear menu (or right-click) the user and click **Assign Full Control Permission**.

> **Note**: Only in active Bluebeam studio sessions may you assign full control permission to users.

Received Files tab

Files are sent from Unifier to Bluebeam either from the document manager or from the **Bluebeam Studio Sessions** node. Subsequently, the file is reviewed in Bluebeam and is brought back into Unifier, after the session creator finalizes the session. The file can be seen in the **Received Files** tab in the **Bluebeam Studio Sessions** node as well as in the **Bluebeam Log** tab of the corresponding file.
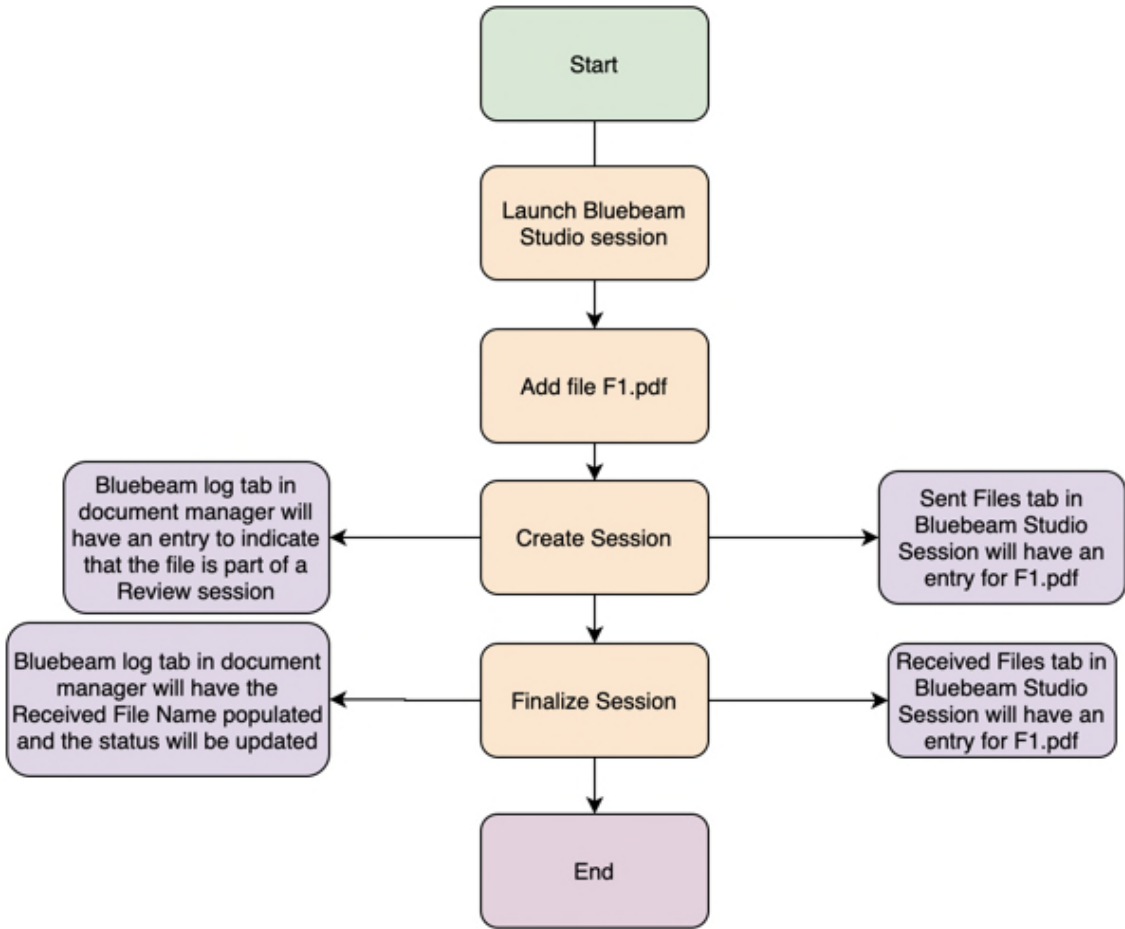
This tab contains the following toolbar options:

▸ **Download all files as Zip file**
▸ **Print (Export To CSV and Export to Excel)**
▸ **Find on page**

The **Received Files** tab contains the following columns:

File Name	The name of the received file.
Rev. No	The revision number of the received file.
Pub. No	The publishing number of the received file.
Size	The size of the received file.

The **Received Files** tab lists files that are received. The gear menu for each file contains the following options:

▸ **Download Markup File**
▸ **Download JSON File**

For Bluebeam sessions initiated in the **Document Manager** > **Documents** node, and by way of the **Bluebeam Studio Session** node, you can download the sent and received files if you have "Download" access to the files used to create session.

For Bluebeam sessions initiated in a Business Process record, you will have "Download" access only if you have one of the following:

▸ You must have at least the **View** permission for the Business Process record.
▸ You are a part of the Business Process workflow (as an assignee). In this scenario, the Business Process record is a Workflow Business Process.

Finalize History tab

The **Finalize History** tab will show the history of the Finalize session action performed on a session.

This tab contains the following toolbar options:

▸ **Find on page**
▸ **Refresh**

The **Finalize History** tab contains the following columns:

Initiated By	The user that initiated the session finalization.
Finalized Date	The date that the session was finalized.

Status	The status of the finalization. The status may be any of the following:
	1. In Progress
	2. Success
	3. Failed
	Any errors encountered at the time of finalizing the session will be seen in the Error Details section of the **Finalize History** tab.

Viewing Markups and Comments

To view markups and comments:

1) After a Bluebeam Review session has been finalized, navigate to the Bluebeam Log tab in the attachments tab to view the Received file from Bluebeam. The received file shows markups and comments.
2) The corresponding JSON file shows comments as line items in the Bluebeam tab.