Oracle
Primavera Unifier
Bluebeam User Guide

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Oracle Primavera Unifier Bluebeam User Guide

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Contents

Overview

Note: The information provided in this document is subject to change.

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.

Unifier integrates with Bluebeam Studio Prime where all the sessions and files are held. Revu then connects to Studio to access the sessions. To use Revu, you must have an account in Studio Prime as well.

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:

- Downloading **Primavera Unifier Wallet** (a zip file) from My Oracle Support for Bluebeam. For more information, see the *Primavera Unifier Installation Guide for On-Premises*.
- 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

Make sure that the Bluebeam administrator has completed the preliminary steps described in the ***Overview***.

To set up Bluebeam in Unifier:

1) Sign into Unifier.
2) Go to the **Company Workspace** tab and switch to **Admin** mode.
3) In the left Navigator, select **Integrations**, and then select **Bluebeam**.
4) In the **General** tab, under **Enable Integration?**, select **Yes**.

   When the integration is enabled, a **Client ID** is displayed. This ID is used when configuring the integration within Bluebeam.

   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.
5) 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) Go to the **Company Workspace** tab and switch to **Admin** mode.
3) In the left Navigator, select **Integrations**, and then select **Bluebeam**.
4) In the **Comments** tab, select the **Enable creation of Line Items from Comments of the Review Session** check box.

   When this option is selected, 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. After selecting this option, the **Attribute Mapping** block and the **Bluebeam Attribute** setup blocks appear.
5) 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 menu.
   d. In the **Unifier Data Element** column, select the data element from the menu.
6) To add a condition:
   a. Type an attribute into the **Bluebeam Attribute** field.
   b. From the menu in the middle column, select **equals** or **does not equal**.
   c. Enter a comment in the **Value** field.
7) 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.
- After 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 menu* ( ) 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) Go to the **Company Workspace** tab and switch to **Admin** mode.
2) In the left Navigator, select **User Administration**, and then select **Access Control**.
3) Expand the **Administration Mode Access** node, expand **Integrations**, and select **Bluebeam**.

   The Module Permission Settings dialog box appears.
4) To add user permissions:
   a. Click **Add**.
   b. In the **Permissions/Access Control** dialog box, click **Add Users/Groups.**
   c. In the **User/Group Picker** dialog box, select users or groups and click **Add.**
   d. Click **OK**.
   e. In the **Permissions/Access Control** dialog box, select the **Configure** or **View** options.
      - 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.
   f. Click **OK**.
5) To modify user permissions:
   a. Check the box next to the user you want to modify, and click **Modify**.
   b. In the **Permissions/Access Control** dialog box, select the **Configure** or **View** options**.**
   c. Click **OK**.
6) To remove user permissions:
   a. Check the box next to the user you want to modify, and click **Remove**.
   b. Click **OK**.

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 the **Company Workspace** tab and switch to **Admin** mode.
2) In the left Navigator, select **User Administration**, and then select **Access Control**.
3) Expand the **User Mode Access** node, and then expand either **Company Workspace** or **Projects/Shells**.
4) Expand **Document Manager** and 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, which accessed by select the Integration node and then selecting the Bluebeam sub-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) Go to the **Company Workspace** or project/shell tab and switch to **User** mode.
2) In the left Navigator, select **Document Manager**, and then select **Company Documents** or **Documents**.

   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 .

3) Upon creation, log in to your Bluebeam account.

Note: You must use the same Bluebeam account going forward.

4) If this is the first time that you are logging on, click **Allow** when you are prompted to grant access to your Studio data.

Create Bluebeam Studio Session will open.

Additional files may be added by clicking **Add Files**. If virus scan is enabled in your environment, the files are checked and an appropriate alert message displays. Infected files and files with pending scans cannot be downloaded in Bluebeam.

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 want to add to the Bluebeam studio session, and then click **Select**.

The **Select Files** window toolbar options:

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

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

Column	Description
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.

Column	Description
Size	The size of the file.

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

Notes:

- 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:

- **Open in Bluebeam Revu**, or
- **Finalize** the session.

Bluebeam Log Tab in the Document Manager

The **Bluebeam Log** tab shown in the right pane of the Document Manager lets you view details of the Bluebeam studio session associated with the selected document.

Only users who have access to the selected document can view and download the files returned from Bluebeam. These files include the Markup and JSON files.

If a Bluebeam session is Active and you have the applicable permissions, you can open the session in Bluebeam Revu by clicking the hyperlink associated with the Session ID.

To access the **Bluebeam Log** tab:

1) Go to the **Company Workspace** or project/shell tab and switch to **User** mode.
2) In the left Navigator, expand the **Document Manager** node, and then click **Company Documents** or **Documents**, depending on which tab you accessed.
3) In the **Documents** log, select the applicable file and click **Expand** in the right pane.

   The file that you should select is the one that participated in the Bluebeam session for which the Bluebeam Log appears in the right pane.

The **Bluebeam Log** tab toolbar options:

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

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

Column Name	Description
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**

Notes:

- Any user who has access to the selected document can see the files returned from Bluebeam. These include the Markup and JSON files.
- If the Bluebeam session is Active, you can get the session details by clicking the hyperlink associated with the Session ID.

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) In the upper-right corner 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, log on to 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**.

   Create Bluebeam Studio Session will open.
5) To add additional files, click **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 opens. 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 want to add to the Bluebeam studio session, and then click Add.

The Add Files window contains the following columns:

Column	Description
File Name	The name of the file.
Title	The title, if any, associated with the file.

Column	Description
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:

- **Open in Bluebeam Revu**, or
- **Finalize** the session

Bluebeam Log Tab in a Business Process Record

When the right pane is expanded for a business process (BP) record and the record has a Bluebeam Studio session, a **Bluebeam Log** tab is also displayed in the right pane. The **Bluebeam Log** tab lets you view details of the Bluebeam studio session associated with the selected record. You can also view the sessions for any associated line items.

Only users who have access to the selected document can view and download the files returned from Bluebeam. These files include the Markup and JSON files.

If a Bluebeam session is Active and you have the applicable permissions, you can get the session details by clicking the hyperlink associated with the Session ID.

To access the **Bluebeam Log** tab for a BP record:

1) Open the applicable BP record.
2) Maximize the window to ensure that you can see the right pane.
3) In the right pane, select the **Attachments** tab and then click **Expand** .
4) On the **Attachments** tab, select the file that participated in the Bluebeam session.
5) To view the session details associated with the attachment, select the **Bluebeam Log** tab.

To access the **Bluebeam Log** tab for the **Line Items** tab of a BP record:

1) Open the applicable BP record.
2) Maximize the window to ensure that you can see the right pane.
3) Select the **Line Items** tab.
4) In the right pane, select the **Attachments** tab and then click **Expand** .
5) On the **Attachments** tab, select the file that participated in the Bluebeam session.
6) To view the session details associated with the attachment, select the **Bluebeam Log** tab.

The **Bluebeam Log** tab toolbar options:

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

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

Column Name	Description
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**

Notes:

- Any user who has access to the file will be able to see the files returned from Bluebeam. These include the Markup and JSON files.
- If the session is Active, you can get the session details by clicking the hyperlink associated with the Session ID.

Bluebeam Studio Sessions Log

The **Bluebeam Studio Sessions** sub-node captures all the Bluebeam studio sessions that are present at the given level. At the Company Workspace level, this node captures all the Bluebeam studio sessions initiated from Document Manager (DM), BP record attachments, and Bluebeam Studio Sessions. When you select the **Bluebeam Studio Sessions** sub-node (which is available through User mode in the Document Manager node of the **Company Workspace** tab or **Project/Shell** tab), the **Bluebeam Studio Session** log 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 pane capturing the details of each Bluebeam studio session

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

Option	Description
Create	Lets you create a Bluebeam studio session. This option is only available if you have the required permission.
View	Lets you 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	Lets you edit your currently selected view.
Refresh	Lets you update the information of the items listed on the log.
Print	Lets you: - **Print** - **Export To CSV** - **Export To Excel**
Find on Page	Lets you activate the find cells for each column 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.

When you select a Bluebeam studio session, the **Bluebeam Studio Sessions** log tabs in the right pane include:

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

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

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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 tab.
2) In the left Navigator, select **Document Manager**, and then select **Bluebeam Studio Sessions**.
3) Click **Create**.
4) Upon creation, log on to your Bluebeam account.

Note: You must use the same Bluebeam account going forward.

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

   Create Bluebeam Studio Session will open.
6) One or more files must be added by clicking **Add Files**. The files listed here are from the **Document Manager**.
7) 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

On the left side of the **Create Bluebeam Studio Session** window, the following fields are displayed:

Field	Description
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.

Field	Description
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 right side of the **Create Bluebeam Studio Session** window contains the **Review Files** tab. This tab contains the following fields:

Field	Description
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 tab.
2) In the left Navigator, select **Document Manager**, and then select **Bluebeam Studio Sessions**.
3) Click the *gear menu* ( ) or right-click the session to review and select **Open in Bluebeam Revu**.
4) 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 tab.
2) In the left Navigator, select **Document Manager**, and then select **Bluebeam Studio Sessions**.
3) Double-click to open the session.

   The Bluebeam Session will open.
4) You can edit the session to add/remove files, add/remove reviewers, change the end date, and so on.

On the left side of the existing **Bluebeam Studio Sessions** window, the following fields are displayed:

Field	Description
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 right side of the existing **Bluebeam Studio Sessions** window contains the **Review Files** tab. This tab contains the following fields:

Field	Description
Name	The name of the document.

Field	Description
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

If you are the creator of the Bluebeam Studio session or if you have the Full Control permission, you can finalize an Active 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 session:

1) Go to the **Company Workspace** tab or project/shell tab and switch to **User** mode.
2) In the left Navigator, select **Document Manager**, and then select **Bluebeam Studio Sessions**.
3) In the **Bluebeam Studio Sessions** log, locate the applicable session, click the *gear menu* ( ) or right-click the session, and select one of the following:
    - **Finalize:** To close the review and markup session and bring the reviewed files and comments into Unifier for subsequent action, select this option.
    - **Finalize and Revise Original File:** This option is only available for Bluebeam Studio sessions created from within a BP record. To close the review and markup session, bring the reviewed files and comments into Unifier for subsequent action, and replace the original file with the revised one, select this option. If the session involves multiple files, all files are updated. If a session has been finalized without replacing the original file (or files), you can replace the original file with the revised one later. For more information, see ***Replacing the Original File with a Revised File***.

      Note: You can only use the **Finalize and Revise Original File** option or the **Revise Original File** option (explained later) *once* per file or session.

    - **Get Session Status:** To view the status of the session, select this option.

If you select one of the Finalize options, the status of the session and all associated documents changes from Active to Finalized (under the Bluebeam Session Status column).

For Bluebeam sessions initiated in the **Documents** sub-node of the **Document Manager** 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 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.

Replacing the Original File with a Revised File

If you are the creator of the Bluebeam Studio session or if you have the Full Control permission and the session was finalized without replacing the original file or files, you can subsequently replace the original files with the revised ones. (You can only perform this action on a record that is not yet in a Terminal status or has not reached a Terminal step in a workflow.) You can select one file or multiple files for revision.

Notes:

- After the session is finalized, the **Revise Original File** option is available for one-time use. For a workflow BP, you must be judicious in choosing at what state of the workflow a document can be revised. As stated previously, the system does not restrict revision unless the BP record in a Terminal status or has reached a Terminal step.
- If there are multiple files with a mixture of **Yes** and **No** in the **Original revised with received file** column, you can only select the files that have not been revised yet (that is, the column indicates No).

To replace the original file with the revised one:

1) Go to the **Company Workspace** tab or project/shell tab and switch to **User** mode.
2) In the left Navigator, select **Document Manager**, and then select **Bluebeam Studio Sessions**.

   You can also complete this step from within a BP record. To do so, open the BP record, select **Expand Attachments**, and then select the document that participated in a Bluebeam session. In the right pane, select the **Bluebeam Log** tab. Click the *gear menu (*) and select **Revise Original File**.
3) In the **Bluebeam Studio Sessions** log, select the applicable session.
4) In the right pane, select the **Received Files** tab.
5) For the applicable file, click the *gear menu (*) and select **Revise Original File**.
6) When the alert appears, click **OK** to continue.

   The original file is updated and the **Original revised with received file** column is updated to **Yes** on the **Received Files** tab. You can also view the list of revised files for a BP on the Attachments tab (Revised column) and on the Revisions tab in the Document Manager.

Deleting a Bluebeam Studio Session

To delete a Bluebeam studio session:

1) Click the **Company Workspace** tab or project/shell tab.
2) In the left Navigator, select **Document Manager**, and then select **Bluebeam Studio Sessions**.
3) Click the *gear menu* ( ) or right-click the session and select **Delete in Bluebeam**.
4) 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 **Edit View** .

   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.

   You can edit the view of the following elements on your log:
   - Columns
   - Filters
   - Group By
   - Sort By
3) 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 **Find on Page** .
2) After the system inserts a new row, 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, you must remove the parameters that you have entered. If you decide to cancel the find for an entire row, 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:

Column	Description
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:

Column	Description
Reviewer Name	The name of the reviewer.

Column	Description
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 after the session is finalized or archived. The *gear menu* ( ) for each item contains the **Assign Full Control Permission** option.

> *Gear menu* options of **Assign Full Control Permission** (for users who have Mark Up Permission can be assigned Full control permission by clicking gear) and **Assign Mark up Permission** (for users who have Full Control Permission can be assigned Full Markup Permission) will be seen. The *gear menu* is only seen for the studio session creator.

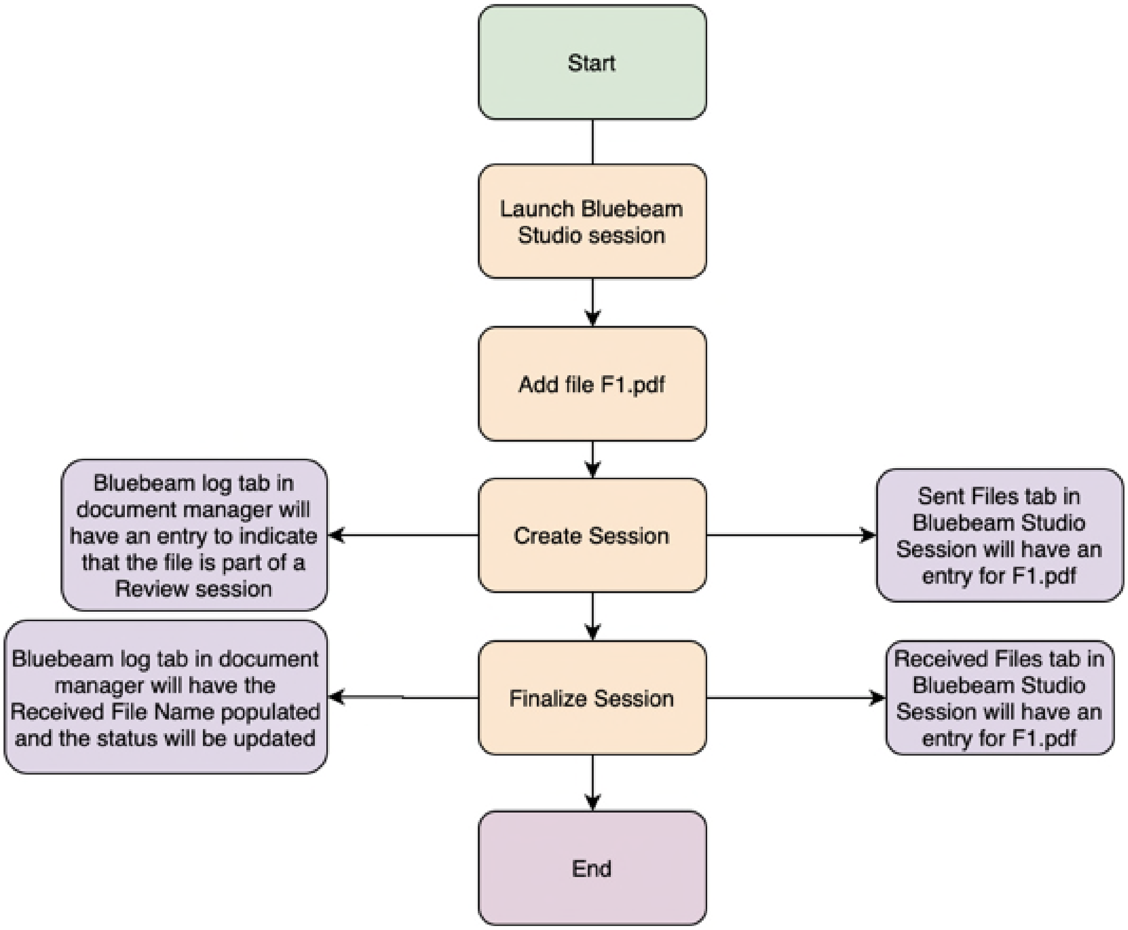
To assign full control permission on a document in Bluebeam:

1) Click the **Company Workspace** tab or project/shell tab.
2) In the left Navigator, select **Document Manager**, and then select **Bluebeam Studio Sessions**.
3) Select the Bluebeam studio session in which you want to assign full control permission to a user.
4) In the right pane, click the **Reviewers** tab.
5) Click the *gear menu* or right-click the user and select **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:

Column	Description
File Name	The name of the received file.
Rev. No	The revision number of the received file.

Column	Description
Pub. No	The publishing number of the received file.
Size	The size of the received file.
Original revised with received file	Indicates whether the original file was updated with the file received.

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 **Documents** sub-node of the **Document Manager** 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 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:

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

Column	Description
Status	The status of the finalization. The status may be any of the following: • In Progress • Success • Failed Any errors encountered at the time of finalizing the session will be seen in the Error Details section of the **Finalize History** tab.
Line items created for all Comments?	Indicates whether line items were created based on the comments received.

Viewing Markups and Comments

To view markups and comments:

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. The corresponding JSON file shows comments as line items in the Bluebeam tab.