This document will cover Best Practices for Electronic Plan Reviews using Bluebeam Revu.
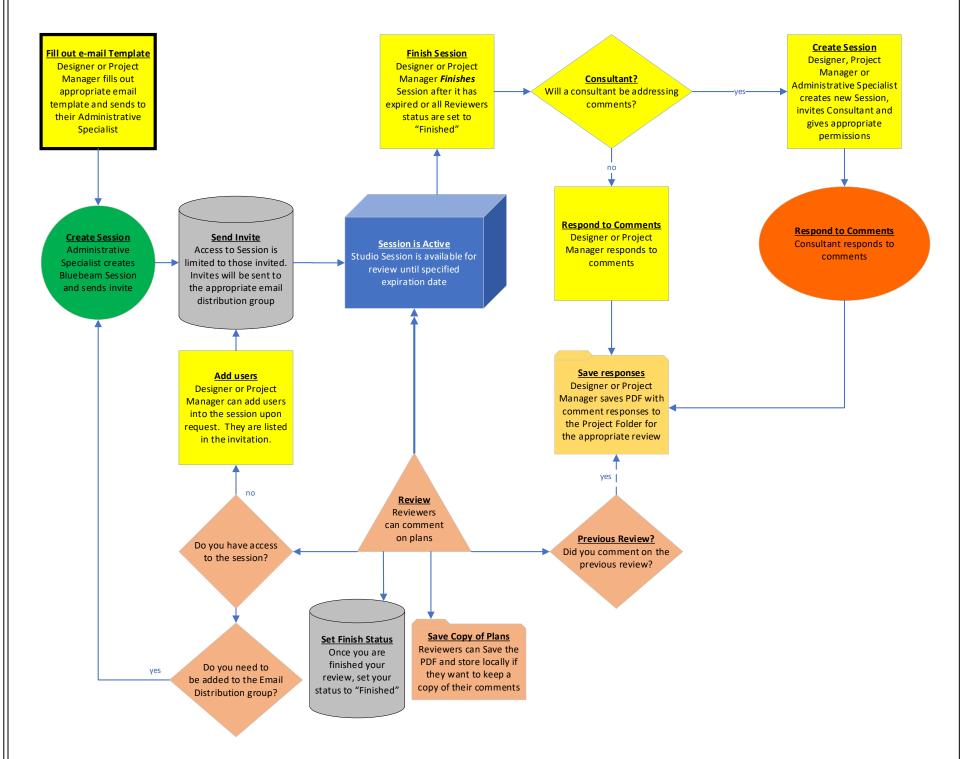
Overview

- Electronic Plan Distribution process

- Best Practices for Commenting on Plans

- Best Practices for Viewing and Responding to Comments

Electronic Plan Distribution Process

Project Development and Bridge have adopted the following process for Department wide Electronic Plan Distributions.

- The Designer or Project Manager fills out the appropriate email template located on the DRC and sends to their respective Administrative Specialist.

- The Administrative Specialist creates the Bluebeam Session and sends the invite out based on the appropriate Email Distribution Group.
  o The Designer or Project Manager will be listed at the bottom of the invitation as the Point of Contact.
  o Session access is limited to those who are invited.
  o It is up to the Reviewing Manager to assign the Review to their staff and request access.
  o Any access requests should go through the Point of Contact listed in the invitation.
  o The Administrative Specialists maintain the Email Distribution Groups. Contact them for a copy or to be added to a specific group.

- The Review Session will be active until the Expiration date listed in the invite. Multiple notification emails will be sent out as the deadline approaches.
  o While the Review Session is active, the reviewer has access to save a copy of the review locally for their records.

- Once the Review Session has expired, the Designer or Project Manager will *Finish* the Session.
  o A copy of the Review Session should be stored in the Project Folder under the appropriate Review stage.
  o All comment responses will made inside the PDF. This replaces the old Comment Response form and should be referenced for Responses to past reviews. This location will also be referenced in the invitation for future reviews.
  o If a consultant will be addressing the comments, the Designer or Project Manager should cleanup the comments as necessary, create a new Session and send invite to the applicable people. The Session can be created by the Administrative Specialist upon request.

Best Practices for Commenting on Plans
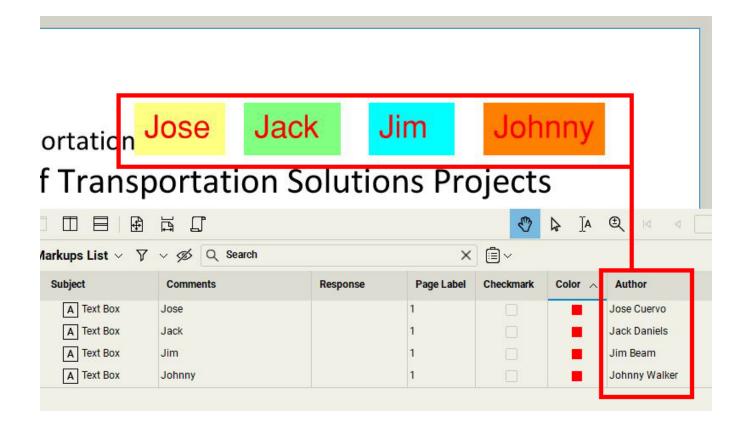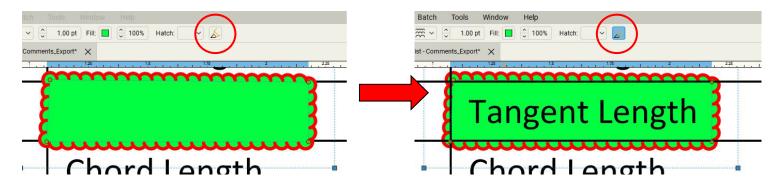
This section is intended to provide Guidelines for commenting on plans and is based on a consensus from Design. Training is available on the DRC that goes into further detail on many of the following topics.
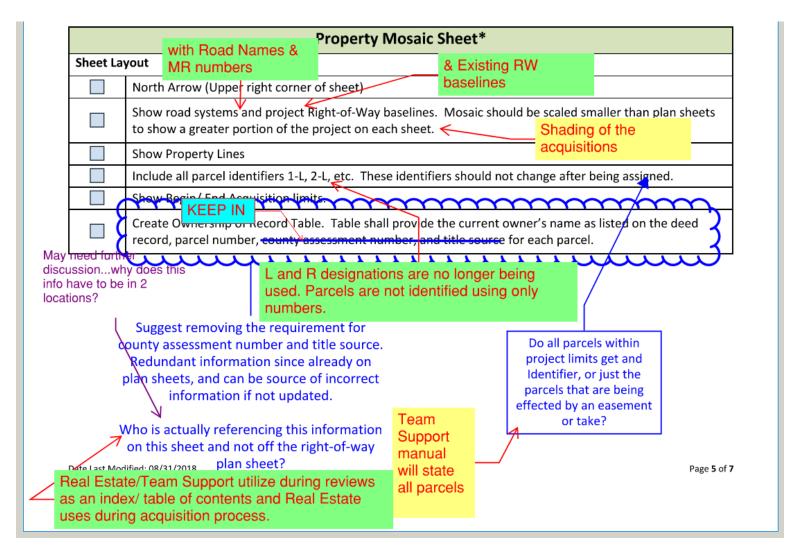
1. It is not necessary to create a legend for your comments in the document, as this is handled by your log-in to Bluebeam Studio, and only adds clutter to the document.

2. Do not add opaque backgrounds to your comment boxes as it obscures what is underneath. This also applies to inserting Pictures.
   2.1. An alternative for Inserting Pictures, is to attach an image to your comment.
   2.2. If you *must* create a filled in area, reduce the opacity or turn on **Highlight mode**.

3. Do not add another Leader box to reply to a comment, instead use the Reply feature.

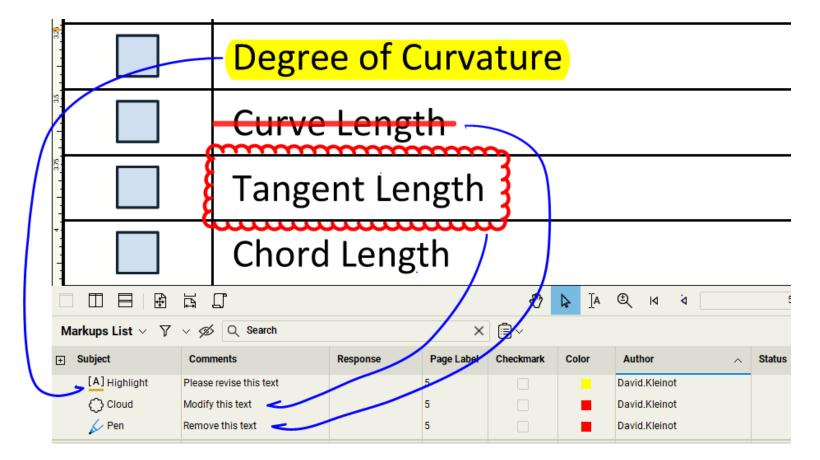4. Whenever possible, highlight text or items and add your comment to the **Comments Column** for the highlight. This can also apply to lines, clouds, circles, etc... This is especially important on sheets with many comments.

5. Group any like comments together. See the Bluebeam Training on the DRC for additional details on how to do this.

6. Do not add **Pop-Up Notes** to items drawn inside a Review Session. This blocks plan data and markups that are underneath, and this information is already in the **Comments** column of the Markups List.

   6.1. If you or someone else has added a **Pop-Up Note**, you can close them one at a time by hitting the X in the upper right corner of the **Pop-Up Note**, or right-clicking on the item and choosing **Close Pop-Up Note**. Closing *your* **Pop-Up Note** will close it for all other users. Creating a **Pop-Up Note** for *your* item, opens it for all users. Closing another users **Pop-Up Note** will close it for you only.

Best Practices for Viewing and Responding to Comments
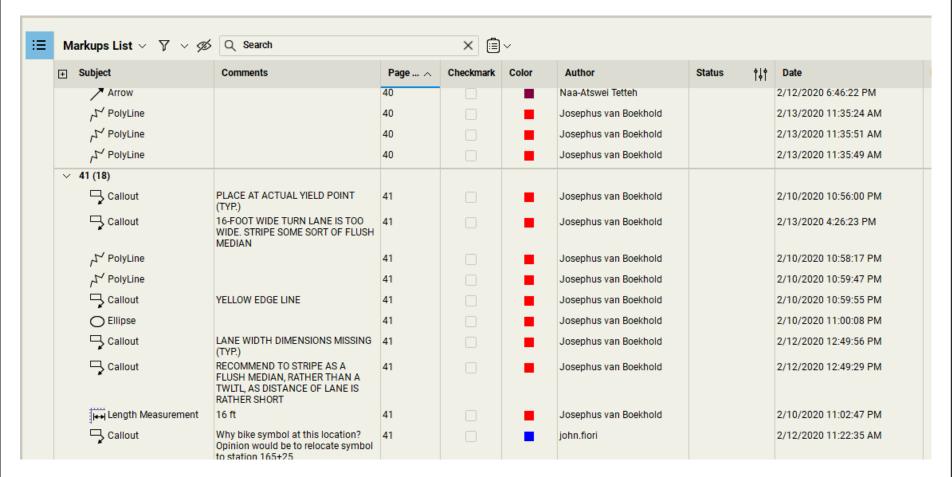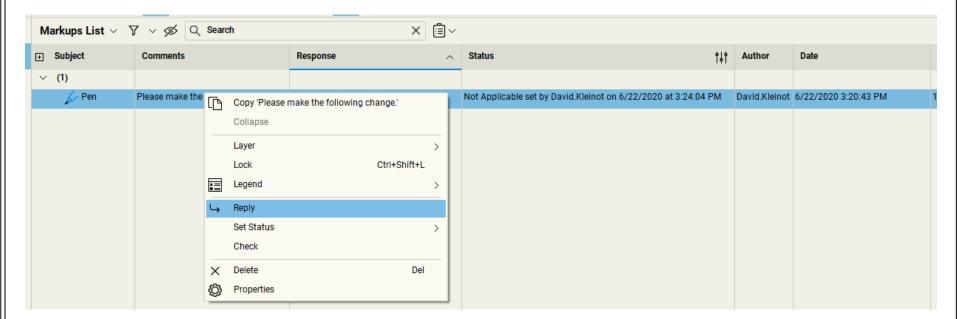
All comments are stored within the PDF and the *Excel Comment Form* should no longer be used. This functionality is completely contained within Bluebeam's **Markups List**, pictured below. For additional training on sorting, filtering and manipulation of the Markups List, see the training on the DRC.
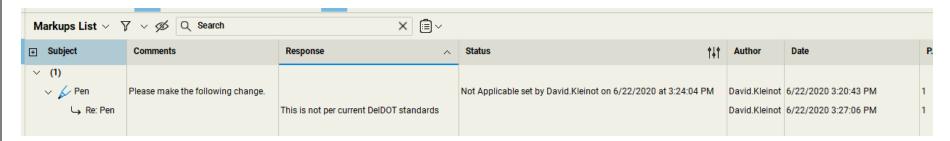

All responses to comments should be done inside of Bluebeam and should, at a minimum, utilize the following procedure:

1. Set the status of the comment. The DelDOT profile has standardized statuses and instructions for loading the profile are on the DRC.

2. If a more detailed response is needed, select the comment, right click and choose **Reply** and fill in the **Response Column**.

   2.1. The **Response Column** should only be used to provide the official response to a comment.
   2.2. The response should be entered in the **Reply**, not the original comment.

3. If you do not see the **Response Column** or the DelDOT specific Statuses, please make sure you have the latest version of the DelDOT Bluebeam profile loaded. Instructions for this are available on the DRC. The DelDOT Bluebeam profile is available on the DRC for those who need it externally.

4. For jobs where consultants are addressing the comments, the following procedure should be followed:
   4.1. The Designer or Project Manager should finish the session per the instructions on the DRC.
   4.2. Any cleanup, grouping, organization or removal of comments may be done at this point.
   4.3. Create a new Session following the *Internal Electronic Plan Distribution* instructions on the DRC and invite the appropriate people.
   4.4. The consultant should adhere to the above for replying to comments.