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WORKING WITH BLUEBEAM

REFERENCES:

Working With Spaces: <https://support.bluebeam.com/online-help/revu2017/Content/RevuHelp/03--View/01--Tabs/Spaces/Working-with-Spaces.htm>

PREPARING THE DRAWINGS

The drawing are prepared by creating and naming the Spaces that will represent the estimated systems. It will be easier to mark the Spaces if the visibility is turned on (see first paragraph in “Making Markups for Phase Code Reports” below).

Spaces should be drawn in a way that best represents the system visually. In Bluebeam, Spaces can be drawn as simple rectangles (click, hold the mouse button down, then drag) or as irregular polygons (click once, then move to the next vertex and click again; repeat as needed, then double click the original vertex, which will close the shape and finish the polygon). When the Space has been successfully marked, a window will prompt the user for a Name. Enter the system name and press Enter. Note that the system name ***should exactly match what is written in the original Excel estimate sheet***. It might be helpful to print out or have handy the original system names as they appear in the estimate form.

Ideally, the markup file containing the system Spaces should exclude all other markups types and be exported as a markup file once completed. See additional notes at the end of this document for a more detailed discussion of how the markup file should be treated.

MAKING MARKUPS FOR PHASE CODE REPORTS

To make the phase code markups properly, the Spaces should be visible on the drawing. The visibility is controlled by a setting that you can change by opening the Spaces panel and looking for the “Highlight Spaces” button (see figure below).

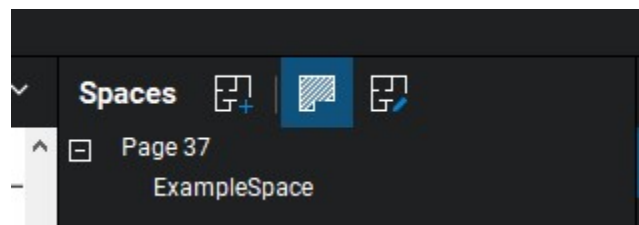


Figure 1 - Bluebeam 2019 "Highlight Spaces" button

Select the desired phase code from the Phase Code toolbox and make the markup within the boundaries of the Space for the system. If the markup is not completely within the boundaries, it will not be detected correctly when the report is generated.

EXPORTING THE MARKUPS

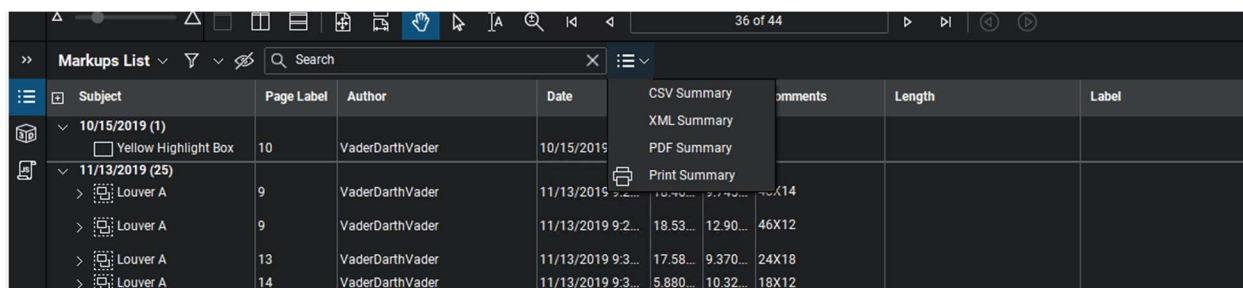
For the PM team to run reports, the markups must be exported from Bluebeam into a Comma Separated Value (CSV) file. Both the field and the office team have the ability to perform this task.

To export the file, open the drawings where the markups were made. Open the Markups tab by clicking



the icon. (Note that your Bluebeam configuration and version might be different than someone else's. If you have Bluebeam 2018 or later, the Markup icon will usually be in the lower left-hand corner. If you can't find it, ask for help).

When the Markup tab opens, there will be a button near the top of the tab, near the middle, that looks identical the Markup icon (see below)



Click the icon and a dropdown menu will appear, with CSV, XML, PDF, and Print Summary options. Select "CSV Summary" and a new window will open. Hit OK¹ and you will be asked to save the file to a location on your computer. This is the data file that will be used by Excel to generate the report.

¹ The window that opens allows users to configure exported summaries. Most users will never make use of this, but admin users should be familiar with this feature. As mentioned in other documentation for the Budget tool, fairly strict formatting rules must be applied to the CSV file. In particular, the columns "Subject" and "Space" must be included in the CSV summary for reports to run correctly. If you're experiencing problems with report generation, check the CSV file and make sure these columns are shown. If not, the problem can be remedied by re-exporting the data, then changing the configuration of the report to make sure the proper columns are displayed, which can be done from this window through the "Columns" tab.