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User Reference

# FS01- Bluebeam Integration with CMiC

By CMiC

**CMiC**  
*Computer Methods*  
*international Corp.*

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4850 Keele Street

Toronto, Ontario M3J 3K1

Canada

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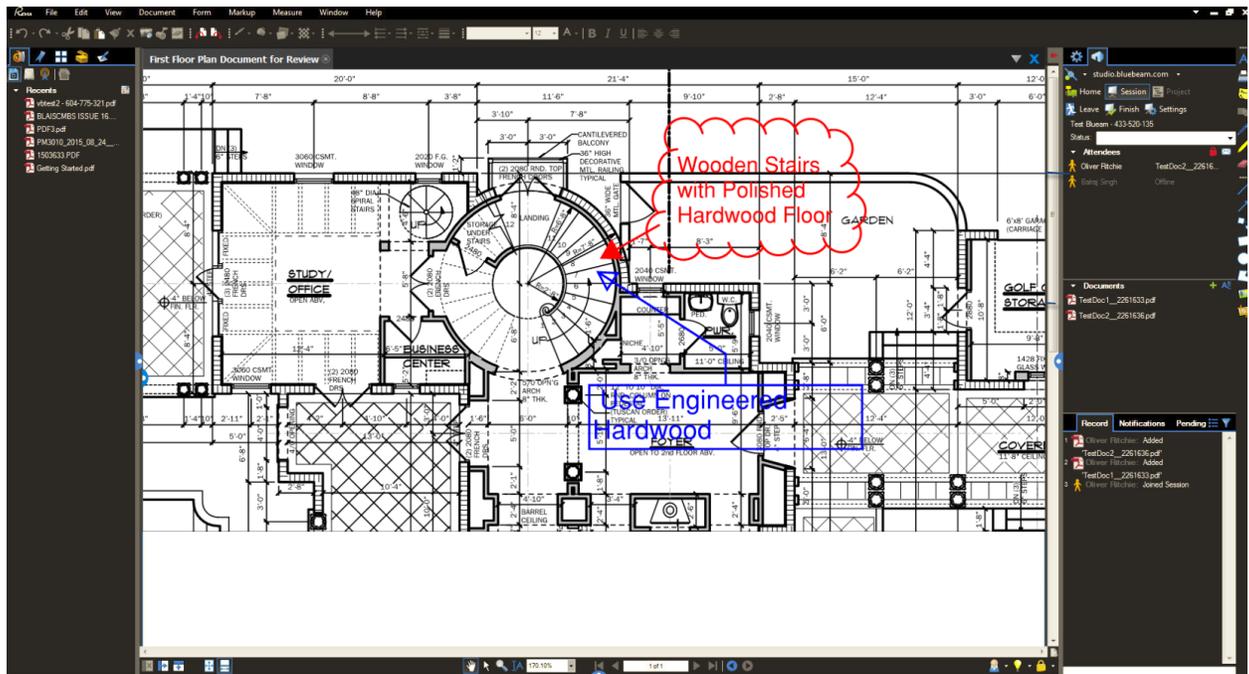
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# Bluebeam® Integration with CMiC

## Overview – Bluebeam Integration with CMiC



Bluebeam and CMiC have collaborated to allow the integration of their software with CMiC's xProjects module to perform basic and advanced operations on PDFs, such as adding markups, creating revisions alone, or creating revisions collaboratively with invited associates via Bluebeam Studio Sessions.

Bluebeam offers a free PDF viewer (Bluebeam Vu) that can be used to view PDFs, and licenses are only required for users that would use Bluebeam to create markups, revisions, and to collaborate (Bluebeam Revu).

For details about the functionality available via Bluebeam Revu, please visit the following Bluebeam sites:

[http://support.bluebeam.com/?utm\\_source=bluebeamnav&utm\\_medium=referral](http://support.bluebeam.com/?utm_source=bluebeamnav&utm_medium=referral)

<http://bluebeam.com/us/bluebeam-university/training-materials/>

<http://support.bluebeam.com/help/#online-help>

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## Prerequisites

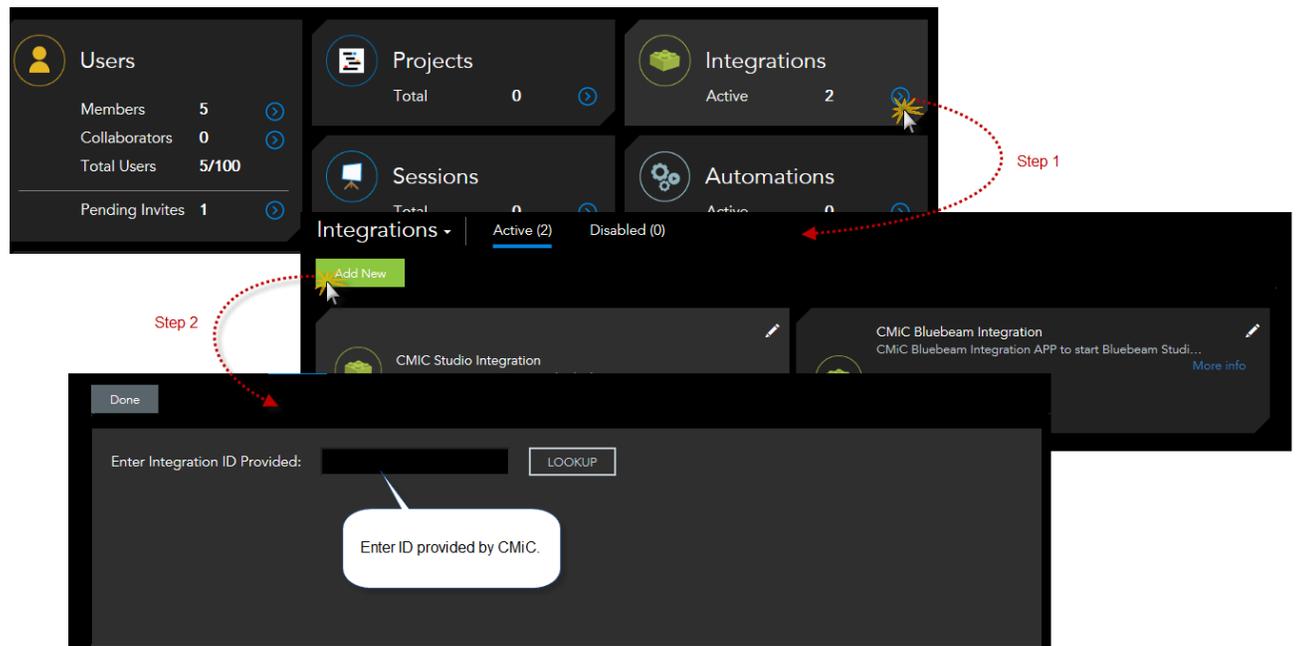
- Bluebeam adapter from CMiC (Feature Set 01 build 26 or higher)
- Bluebeam Studio Prime license from Bluebeam
- Bluebeam's Bluebeam Vu (PDF viewer) or Revu (PDF markups & collaboration) software installed on all required desktops
- Bluebeam certificates installed on CMiC app server to allow communicate between it and Bluebeam's servers
  - Bluebeam certificates need to be installed by our DBAs if you have a DBA agreement with us, otherwise, our DBAs will send instructions for installing the certificates if you have your own DBAs
  - For further details, please contact your CMiC Consultant

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# Set Up CMiC Bluebeam Integration Application

The setup can be done in three steps:

1. Register the CMiC Bluebeam integration application in your database - run the **F01add\_bbm\_app\_info\_prod.sql** script, and when prompted, enter “**DA**” if you are a CMiC Enterprise user or enter your Tenant Code if you are a CMiC Cloud user.
2. Contact CMiC for the Bluebeam integration application ID.
3. Add the CMiC application in the **Integrations** section of the Bluebeam prime account (steps are shown below), and enter the ID provided by CMiC in the **Enter Integration ID Provided** field. Click **[Done]** when finished.



# Bluebeam Studio Integration with xProjects

On the **Attachments** tab, only the latest revision of the marked up attachment will be shown.

If there are markups, the revision number will be greater than 0 and a **History** link will appear to the right of the revision number in the same column. Clicking on this link will open the standard popup showing the full revision history.

Type	Number	Name	Rev. Number	Rev. Date	Description	Notes	User	
Attachment	ATTCCC-60000005	Blue Beam Testing	0	History	07/Mar/2014	Original Version	CMIC QA	
Attachment	ATTCCC-60000002	DEMO_A21	0	History	27/Feb/2014	Original Version	CMIC QA	
Attachment	ATTCCC-60000003	GL-REPORT	0	History	27/Feb/2014	Original Version	CMIC QA	
Attachment	ATTCCC-60000004	JC_TRANSACTION_REPORT	0	History	27/Feb/2014	Original Version	CMIC QA	
Attachment	ATTCCC-60000001	First Floor Plan for Bungalow	2	History	27/Feb/2014	Created by BlueBeam	27-FEB-14 (CQ) Notes Added	CMIC QA

Number	Designer Ref.	Revision Date	Received Date	Status	User	Description	Notes	Attachment	Change_#	ESignings	Action
0	1	27/Feb/2014	27/Feb/2014	Open	CMIC QA	Original Version		First Floor Plan.pdf			Create Change Link Change Update Packages
1		27/Feb/2014	27/Feb/2014	Open	CMIC QA	Created by BlueBeam		First Floor Plan.bax			Create Change Link Change Update Packages
2		27/Feb/2014	27/Feb/2014	Open	CMIC QA	Created by BlueBeam	27-FEB-14 (CQ) Notes Added	First Floor Plan.bax			Create Change Link Change Update Packages
3		27/Feb/2014	27/Feb/2014	Open	CMIC QA	Created by BlueBeam		First Floor Plan.bax			Create Change Link Change Update Packages
4		07/Mar/2014	07/Mar/2014	Open	CMIC QA	Created by BlueBeam		First Floor Plan.bax			Create Change Link Change Update Packages
5		07/Mar/2014	07/Mar/2014	Open	CMIC QA	Created by BlueBeam		First Floor Plan.bax			Create Change Link Change Update Packages
6		07/Mar/2014	07/Mar/2014	Open	CMIC QA	Created by BlueBeam		First Floor Plan.bax			Create Change Link Change Update Packages
7		07/Mar/2014	07/Mar/2014	Open	CMIC QA	Created by BlueBeam		First Floor Plan.bax			Create Change Link Change Update Packages
8		07/Mar/2014	07/Mar/2014	Open	CMIC QA	Created by BlueBeam		First Floor Plan.bax			Create Change Link Change Update Packages
9		07/Mar/2014	07/Mar/2014	Open	CMIC QA	Created by		First Floor Plan.bax			Create Change Link Change Update Packages

## Create Bluebeam Studio Session

To supplement the following documentation about Bluebeam Studio Sessions, the following Bluebeam training video and online help can be referenced:

### Training Video

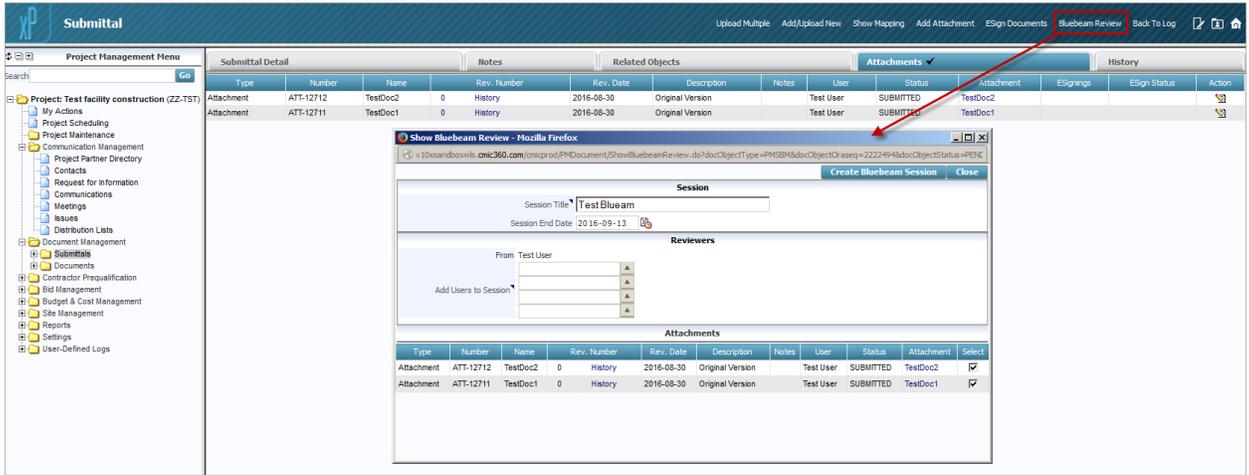
<http://bluebeam.com/us/bluebeam-university/training-materials/studio-sessions.asp>

### Online Help

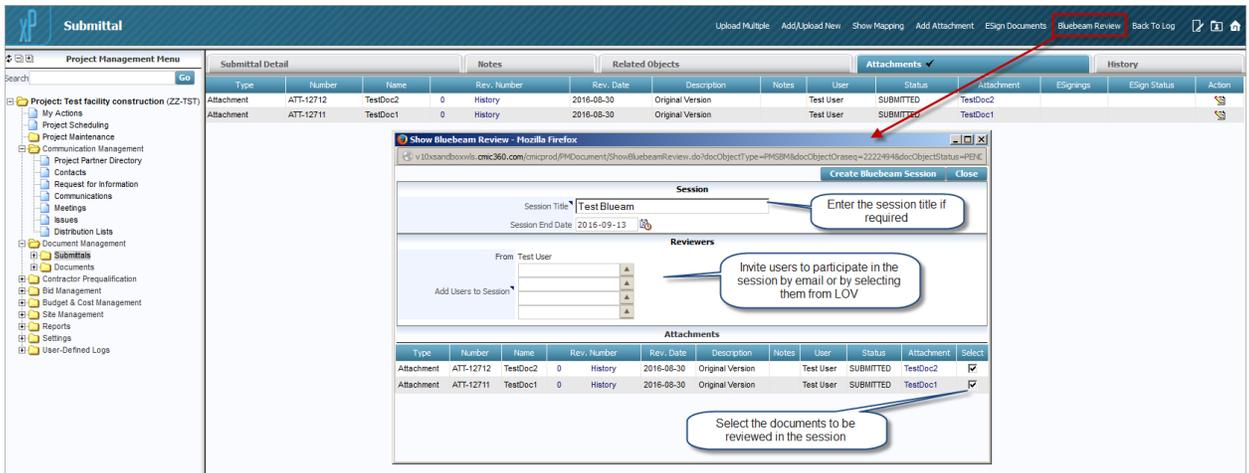
<http://support.bluebeam.com/help/#online-help>

<http://support.bluebeam.com/online-help/revu2016-5-1/Default.htm#RevuHelp/00--Command-Bar/06--Studio/Studio-Host--M.htm#kanchor332>

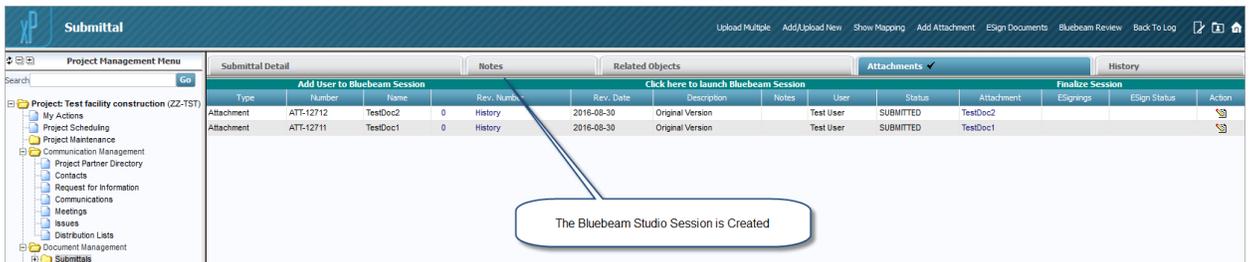
1. To create Bluebeam session, click the **[Bluebeam Review]** button, which is accessible on the **Attachment** tab of a PM Object, such as a Submittal:



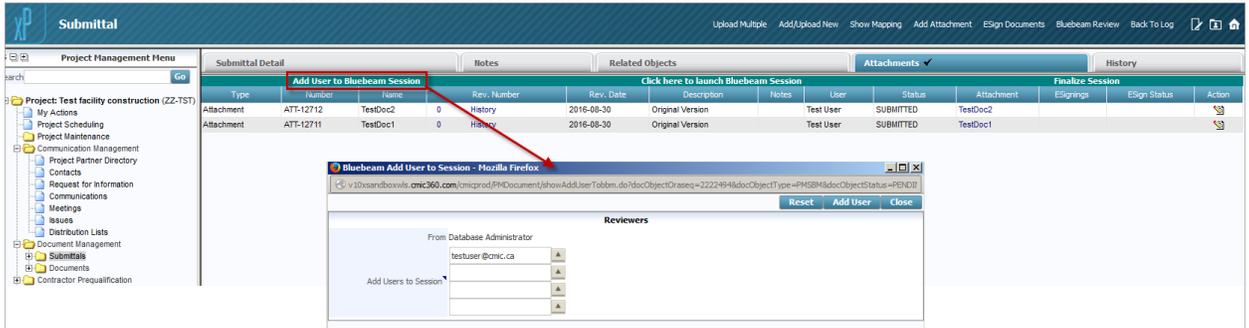
2. In the launched popup, enter a title for the Studio Session (if change is required), invite collaborators to the Session by entering their emails or selecting Contacts from the LOV, and select the document(s) to be reviewed during the Studio Session:



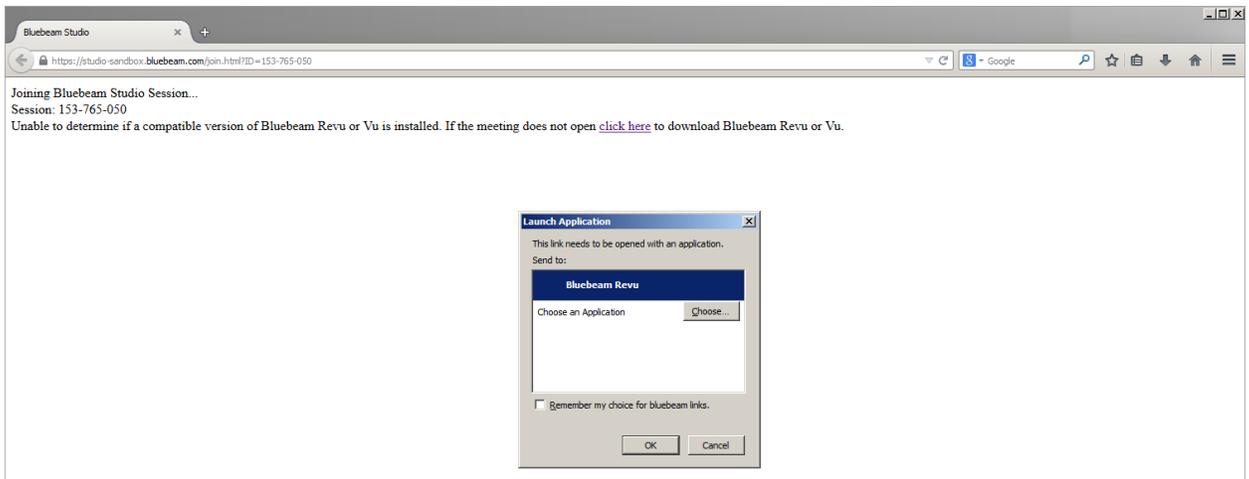
3. Upon clicking the **[Create Bluebeam Session]** button, shown in previous screenshot, a green bar appears, shown below, to indicate that the Bluebeam Studio Session has been created:



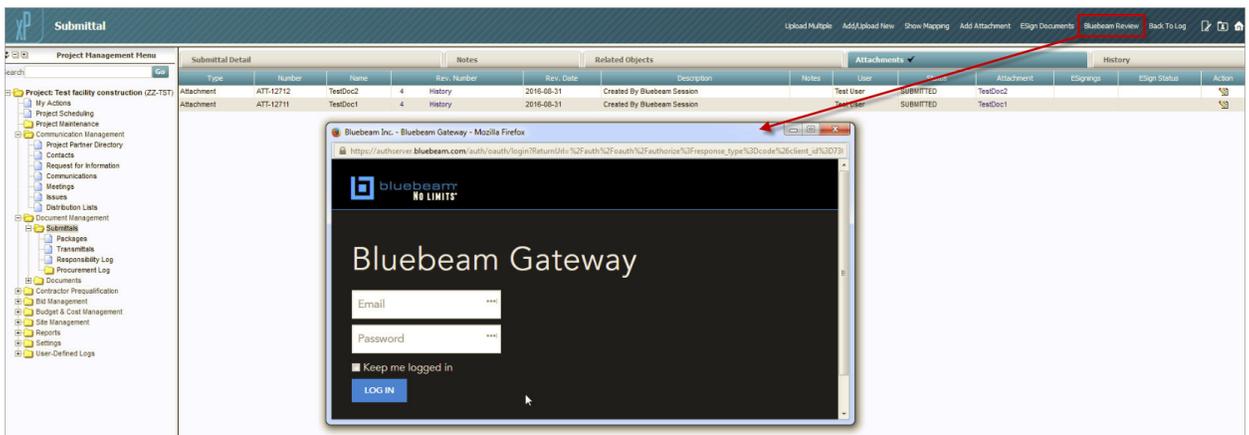
If more users are required to participate in the Studio Session, click the **Add Users to Bluebeam Session** link in the green bar, which launches a popup to add more users to the Session:



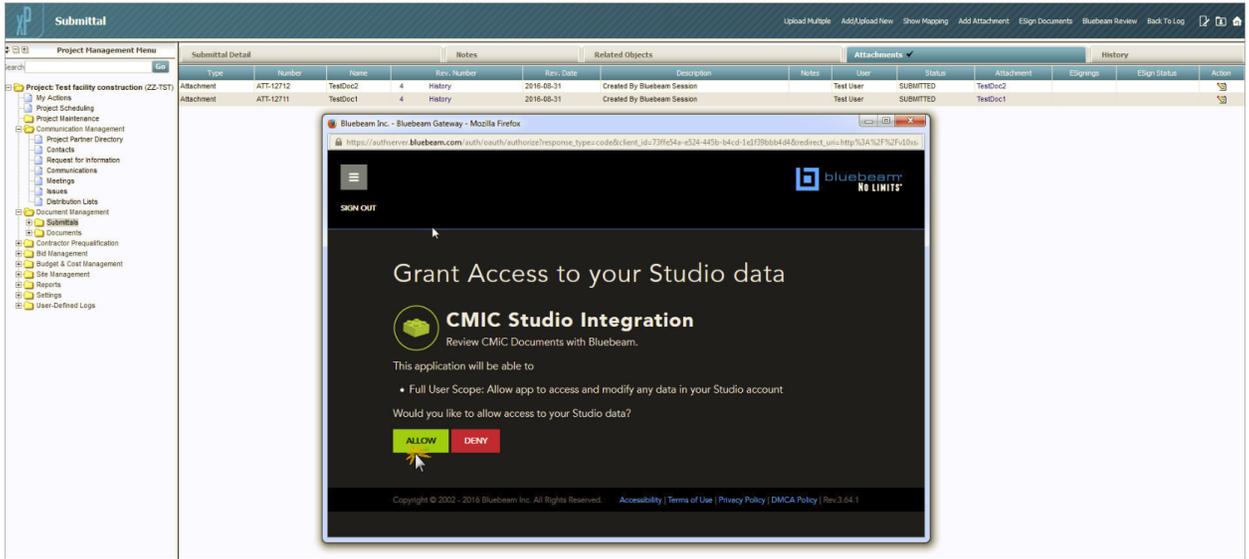
4. The **Click here to launch Bluebeam Session** link in the green bar starts the process of joining the user to the created Bluebeam Session. It may ask you to select the application if a compatible version is not found on the computer:



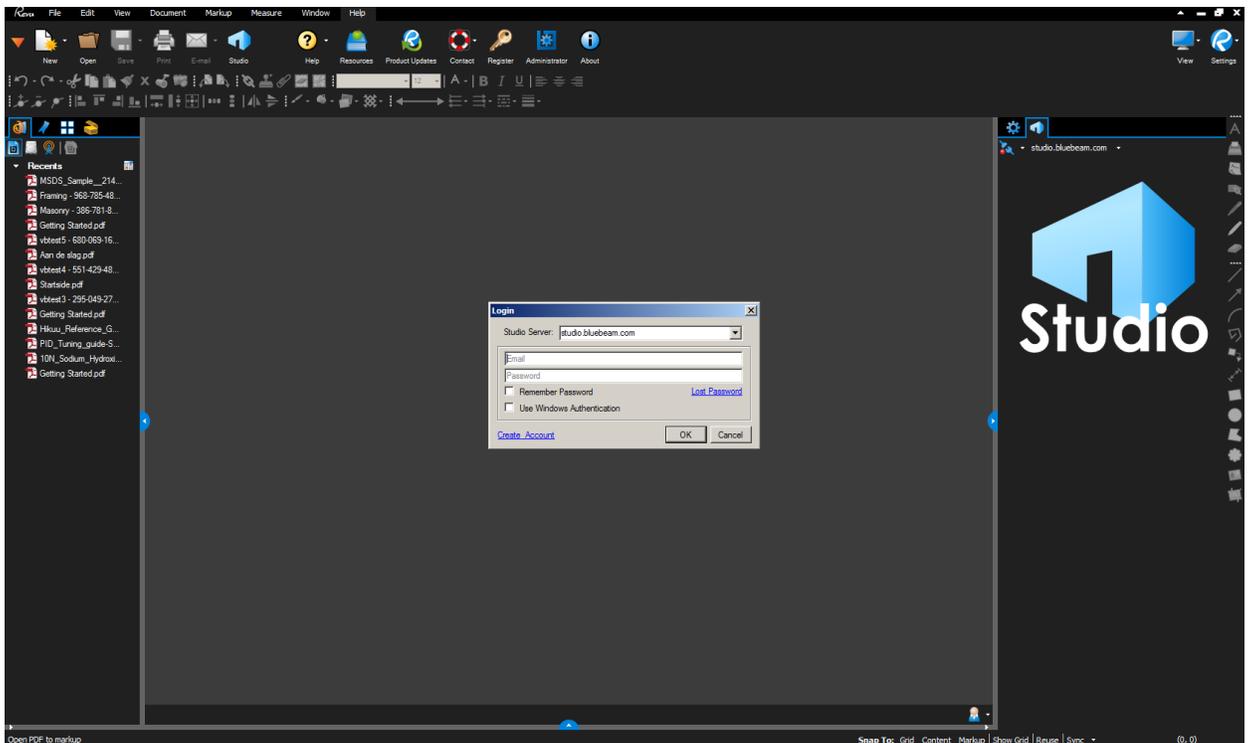
5. If the current CMiC user created the Bluebeam Studio Session within the last 60 days, move on to the next step; otherwise, upon clicking [OK], the Bluebeam Gateway popup appears, asking for your credentials.



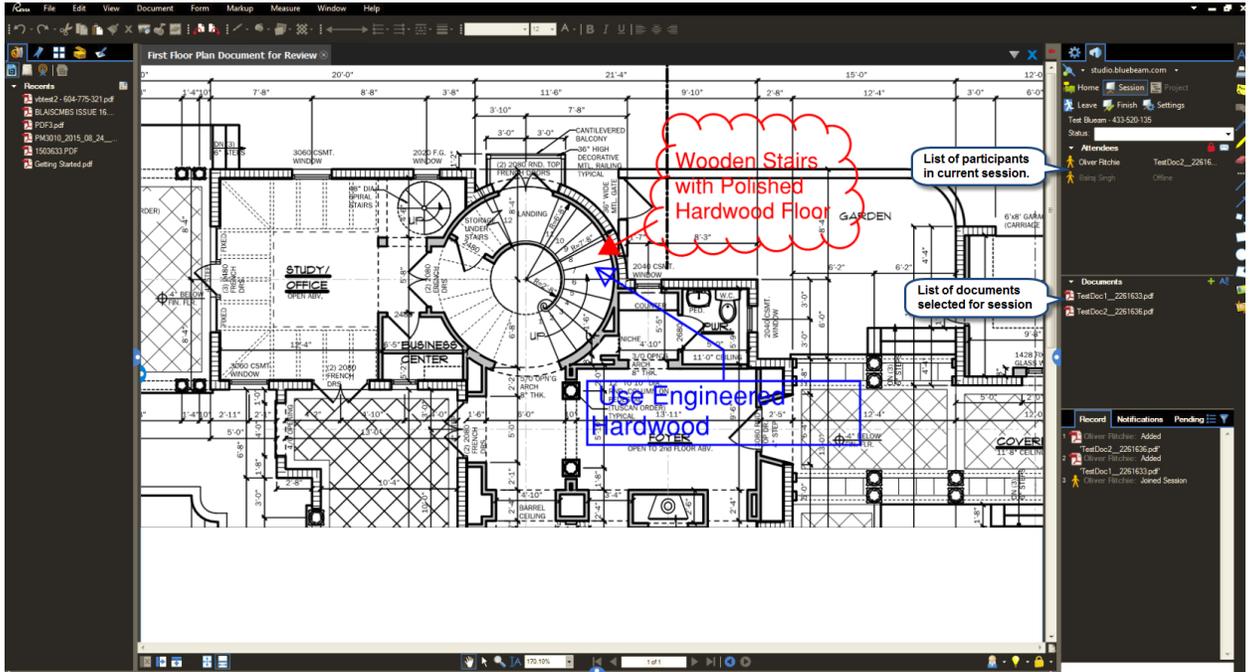
When logged into the Studio, a prompt will ask if you want to allow CMiC's software access to your Bluebeam Studio data. Click **[Allow]**:



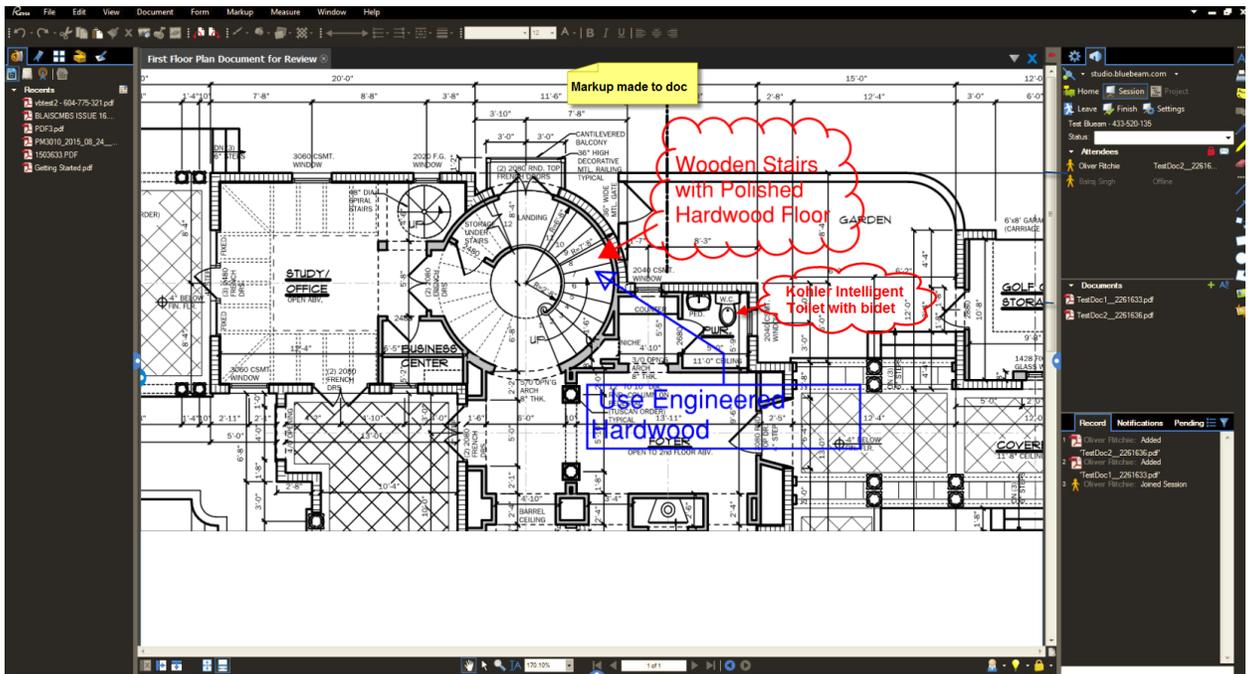
6. In order to join the session, enter your Bluebeam Studio credentials:



7. Upon clicking [OK], the user joins the Session, and documents selected for the Studio Session appear on the screen:

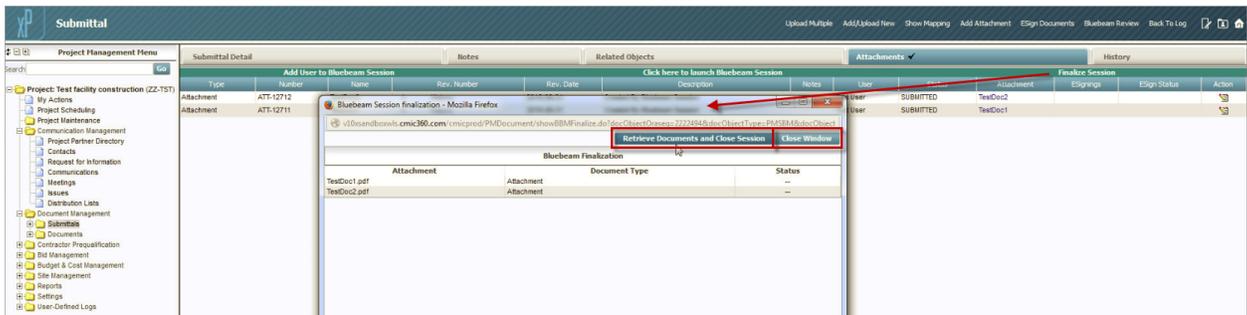
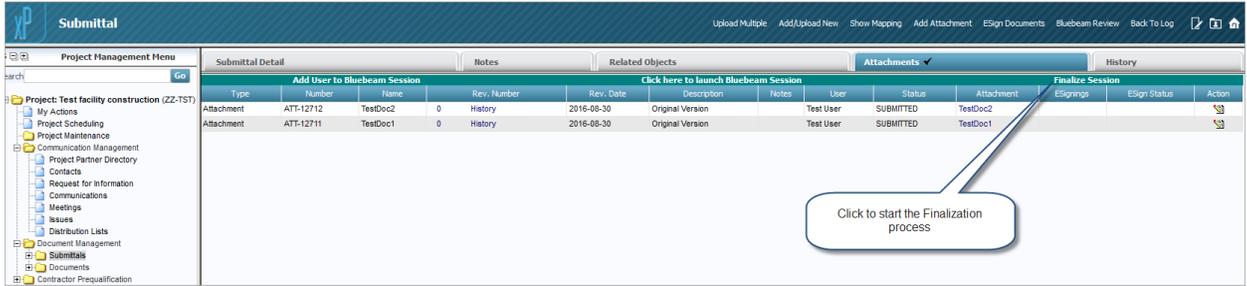


8. In the Session, the document has been modified:



9. When modification is done, and the session is over, close Bluebeam Studio.

10. To save the changes in the document and create new revision – click **[Finalize Session]** to start finalization process:



The following provides details about the buttons on the finalization popup, shown above:

**[Retrieve Documents and Close Session] – Button**

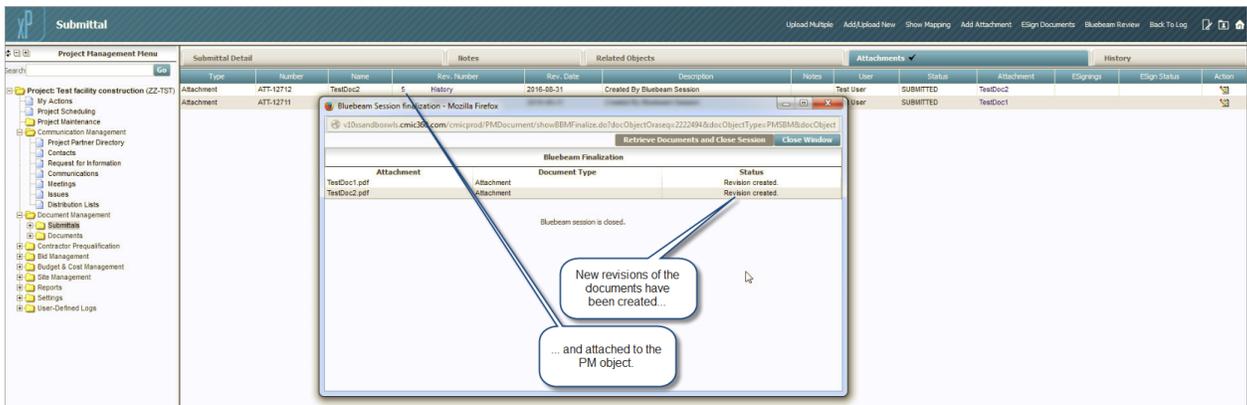
Creates new revisions of documents (which appear in the current PM Object), and closes the Bluebeam session.

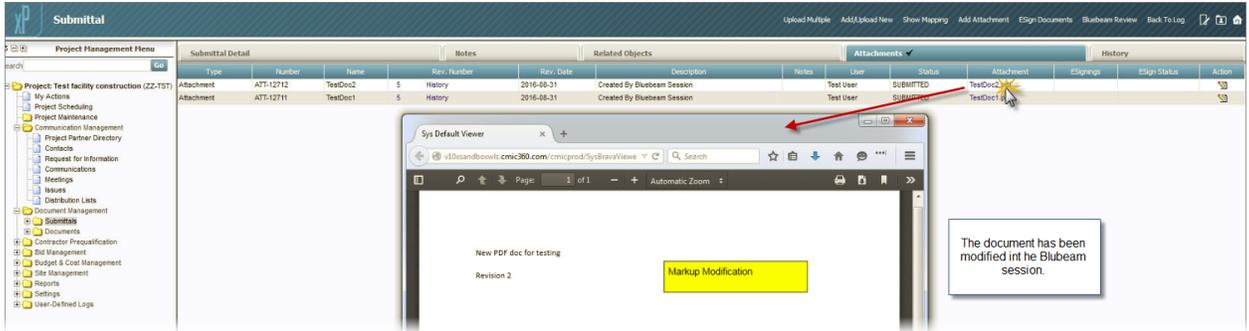
**[Close Window] – Button**

Closes the finalization window.

11. Click the **[Retrieve Documents and Close Session]** button to save the changes and to create the new revisions of the documents.

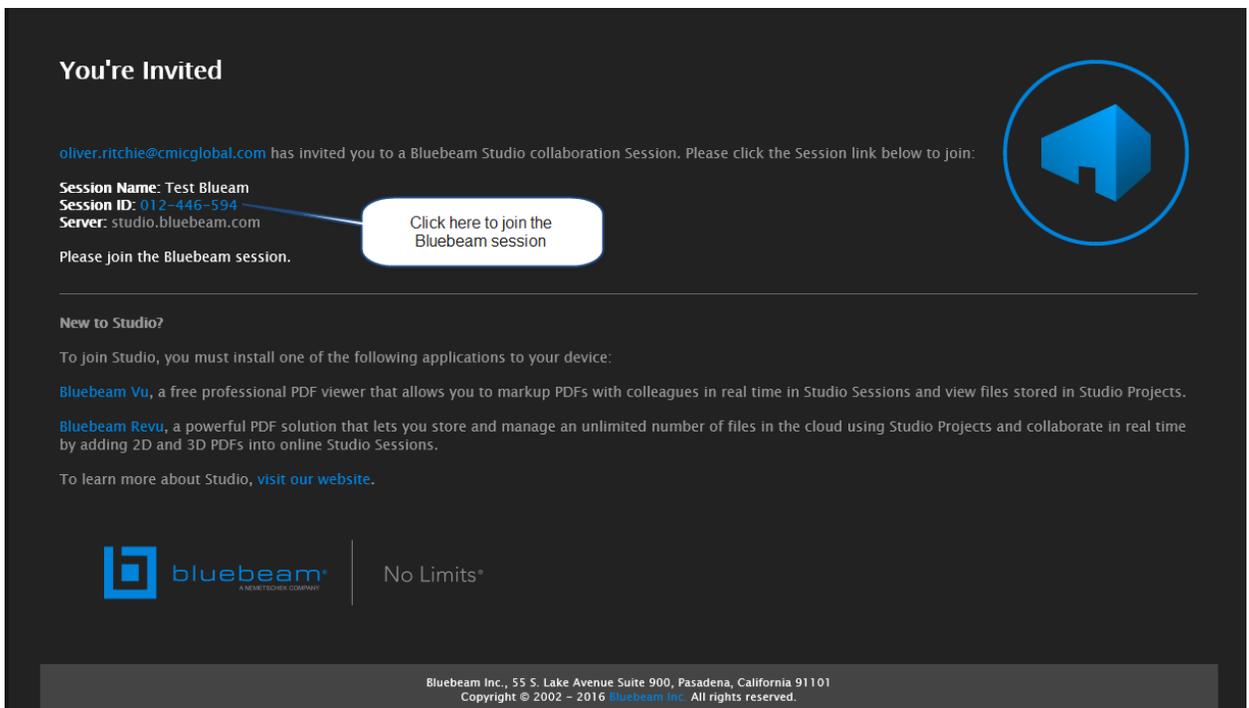
When finished, the result of the finalization will be displayed in the **Status** column, and new revisions will be attached to the PM Object:



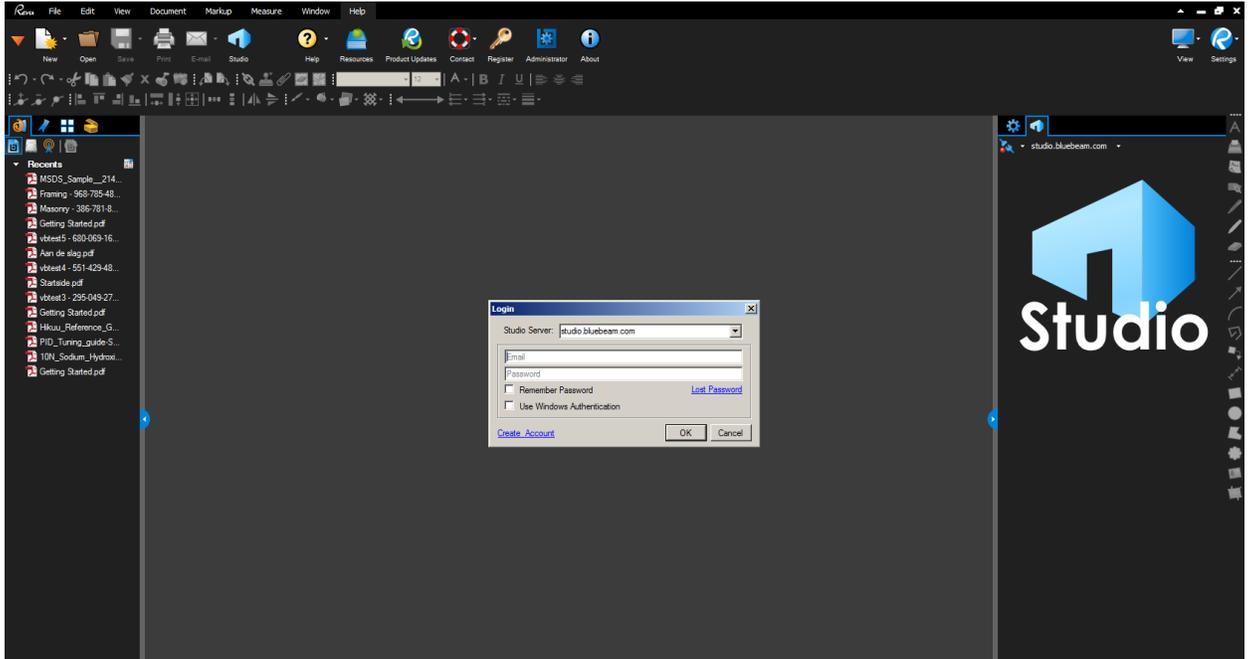


## Invited Collaborators Joining Studio Session

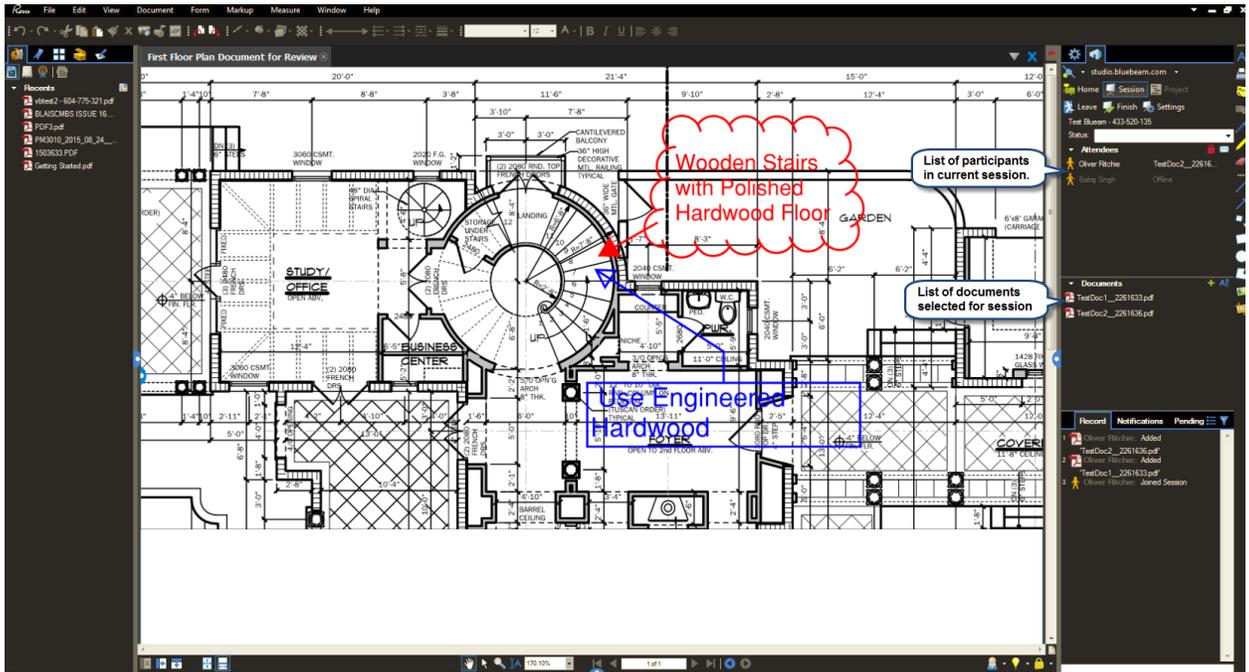
1. When invited, the participant receives an e-mail:



2. Upon clicking the Session ID, Bluebeam Studio is launched, and the collaborator is required to enter their Bluebeam credentials to join the session:



3. Upon clicking [OK], the user joins the session, and documents selected for it appear on the screen:



## Add Files to Studio Sessions to Import into CMiC Enterprise

When a Bluebeam Studio Session is created, the documents selected to be reviewed during the Studio Session are uploaded from your CMiC Enterprise system to that of Bluebeam, which hosts the session.

When the session is ended, the documents will be imported back into your CMiC Enterprise system with an incremented revision number.

During the Studio Session, if a new file is added to the session, when the session is ends, the new file will be imported into you CMiC Enterprise system with a revision number of 0, and linked to the PM Object.

For details about adding files to a Studio Session, please refer to the following Bluebeam documentation:

<http://support.bluebeam.com/online-help/revu2016-5-1/Default.htm#RevuHelp/00--Command-Bar/06--Studio/Studio-Host--M.htm#kanchor332> (relevant Bluebeam online help path: *Host a Studio Session > Managing a Session > Managing Documents > Adding a File*)

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