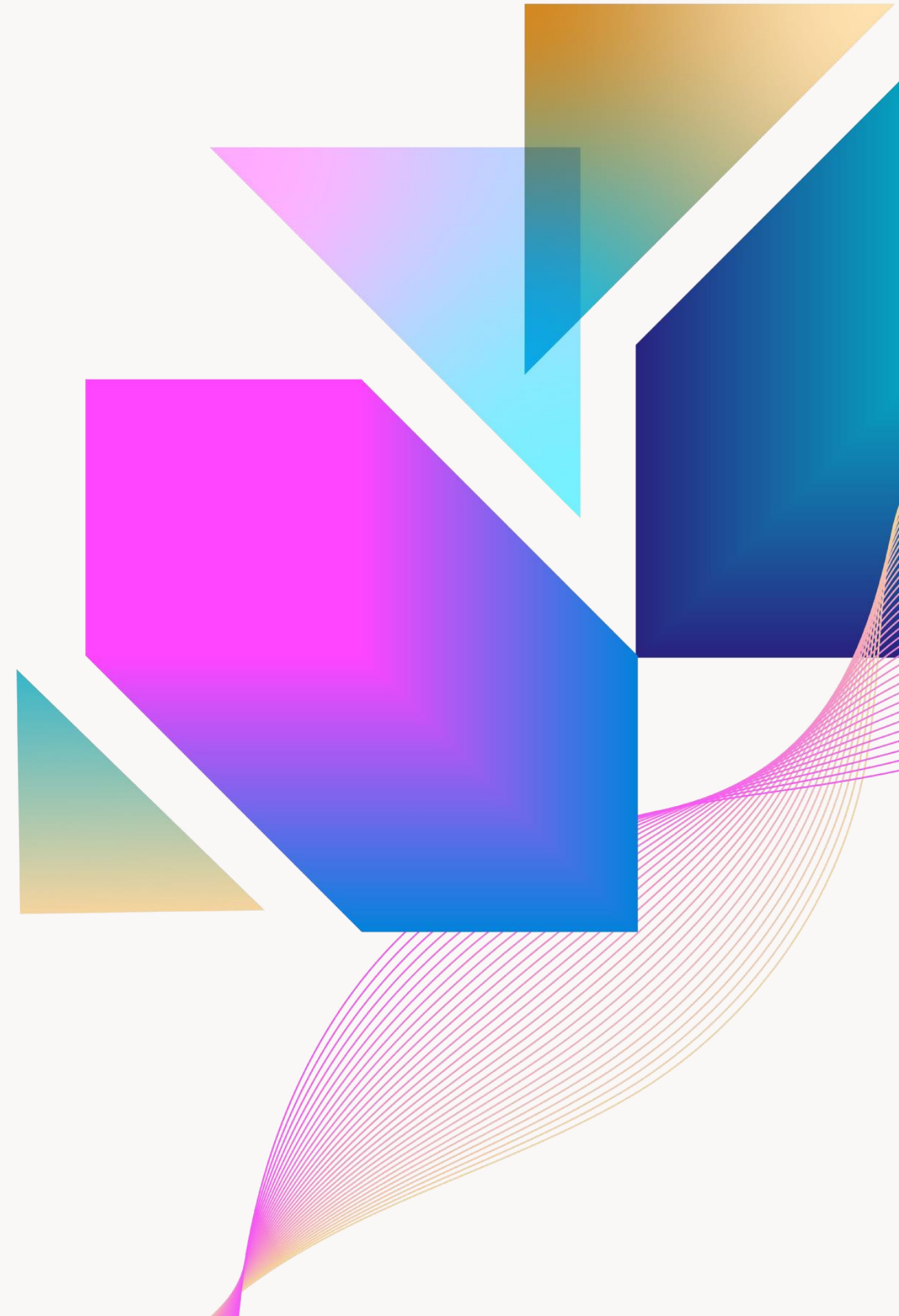# UNBOUND

Big Team, Smart Tools:

Lessons from supporting 1,000+ Users in 37 offices

Scott Mizsak

Big Team – Smart Tools

Scott Mizsak has spent the last five years as a Sr. CAD Administrator (CAD Coordinator for Bolton & Menk Inc. Job duties include keeping all things Autodesk (Team of 5) and Bluebeam (Team of 1) up and running for the company. This entailed support calls, training and maintaining the company standards.

Prior to Bolton & Menk, Scott spent the previous 9 years as an Application Engineer at an Autodesk reseller where he was an Autodesk Certified Instructor as well as a Bluebeam Certified Instructor and Certified Technical Consultant.

Scott has spoken at Bluebeam XCON, Bluebeam Unbound, Autodesk University (7x), Midwest University (15+), ACEC-WI (4x) and several other regional conferences over the last 13 years

Scott Mizsak

CAD Coordinator

Bolton & Menk Inc

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Agenda

01 Licensing

    Transition to Named User Licensing

    Onboarding 100+ New full-time users and 100+ Summer Interns each year

    Challenge of assigning a license based on their role with the company

02 Standards

    How do we get users to use the same tools

    Training

03 Updates

    What has work to make sure users are on the current version

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Licensing

Transitioning to named user

Who is not on Named User?

Process:
- Sent out an email to all users
  - Two Weeks prior to releasing Bluebeam Revu 21
  - Reminder email the day before the license was assigned
  - With a link to instruction for creating their account and software installation
- Created a Deployment and put it into Software Center (SCCM) with elevated permissions
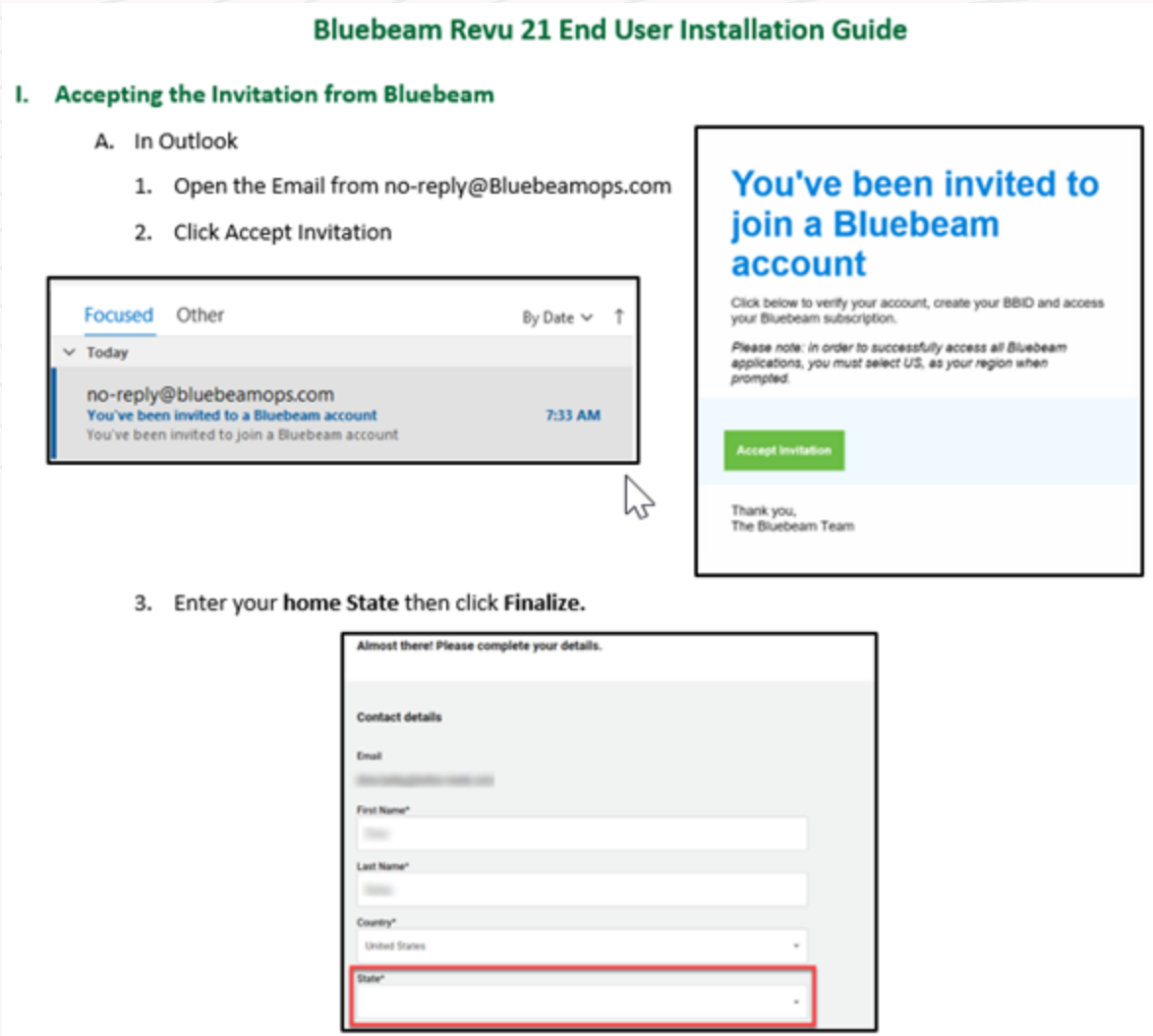
What went wrong:
- Only 44% of the users actually opened the email
  - Means only 44% had the ability to click on the link (1000 x .44 = 440)
  - Estimate that only 40% actually clicked on the link (440 x .40 = 176)
- Had over 125 tickets thinking the email from noreply@bluebeamops.com was phishing

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Licensing

Transitioning to named user

Solution:
- Put the instruction in the body of the email with an additional link to the pdf
- Created a Deployment that would disable the Auto Update notification, load a preset Preference's, and disable the Welcome Screen
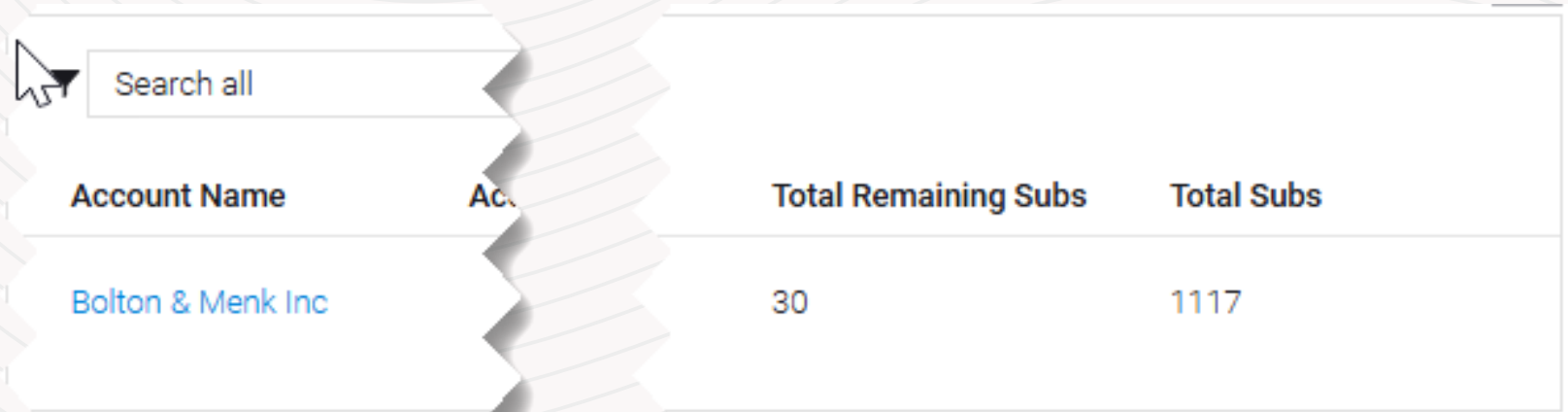

Property	Value
BB_AUTO_UPDATE	0
BB_DISABLEANALYTICS	1
BB_REVUPREFERENCES	W:_PDF Management\Bluebeam Revu\Revu_21\Deployment 21_3\RevuPreferences.xml
DISABLE_WELCOME	1
ALLUSERS	1

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Licensing

100+ New Hires and 100+ Summer Interns every year

		Total Remaining Subs	Total Subs
Account Name	Ac...		
Bolton & Menk Inc		30	1117

Search all

Background:
- Average 2 new users every week and 120 new interns every summer
  - 289 in 2025 (Through July)
  - 268 in 2024
  - 170 in 2023

Process:
- Less then 3 user per week – add users one at a time
  - The extra time is saved by not building a csv file to Bulk load
- More then 3 users per week- bulk load them

Problem:
- The Bulk load process could not distinguish between an Intern license and the Complete version
- Users that were Deactivated (Interns).

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Licensing

100+ New Hires and 100+ Summer Interns every year

Solution:
- Left the license type blank for any Intern license
  - Had to manually assign the license for interns
  - But at least the rest of the data was entered.
- Had to Download the error report
  - Search for users who already existed but were deactivated
  - Assign them a license
  - Save their profile
  - Go back in and fill in their name

isOrgAdm	isEndUser	Country	PreferredL	Phone	PhoneExt	MobilePh	ProductTi	ServerRegion
FALSE	TRUE	US	English (US)				Core	US
FALSE	TRUE	US	English (US)				Core	US
FALSE	TRUE	US	English (US)				Core	US
FALSE	TRUE	US	English (US)				Core	US
FALSE	TRUE	US	English (US)				Core	US
FALSE	TRUE	US	English (US)					US
FALSE	TRUE	US	English (US)				Complete	US
FALSE	TRUE	US	English (US)				Complete	US
FALSE	TRUE	US	English (US)				Complete	US
FALSE	TRUE	US	English (US)				Complete	US
FALSE	TRUE	US	English (US)				Complete	US

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Licensing
What License is assigned based on the user's role

Background:
- Bolton & Menk is a Full-Service Civil Engineering Firm
  - Job roles cover the full gambit from Technician to President
  - Bolton & Menk has Complete, Core, Basics and Complete-Intern licenses

Process:
- Everyone is assigned a license on their first day.
- Project Manager and Admin Assistants get the Complete license

Problem:
- Some users will not need a license
  - Adobe Creative Cloud users
  - Users that are full time outside
  - Users who deal with DOT's that mandate Adobe Pro (Yuck!)
- Upper management doesn't like paying for something that isn't being used.

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Licensing

What License is assigned based on the user's role

Solution:
- Extract the user list from the Bluebeam Admin Portal every two weeks
  - Switch users to the Unpaid version if they did not accept the invitation after 2-3 weeks

Checklist:
- Interns – 30% of our interns are Inspectors or GIS data collectors
  - Inside – Complete Intern
  - Outside – Unpaid
  - Chess match to see who is who
- Survey Department
  - Inside staff – Core
  - Outside staff – Basics/Unpaid
- Engineering Departments
  - Technicians – Core
  - PE's – Complete
- Administrative Staff – Complete
- Marketing Department – Uses Adobe Products

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Question

Do you have a variety of license types or just one?

Do you have employees that would require a specific license type?

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Standards

How did I get everyone to use the same tools
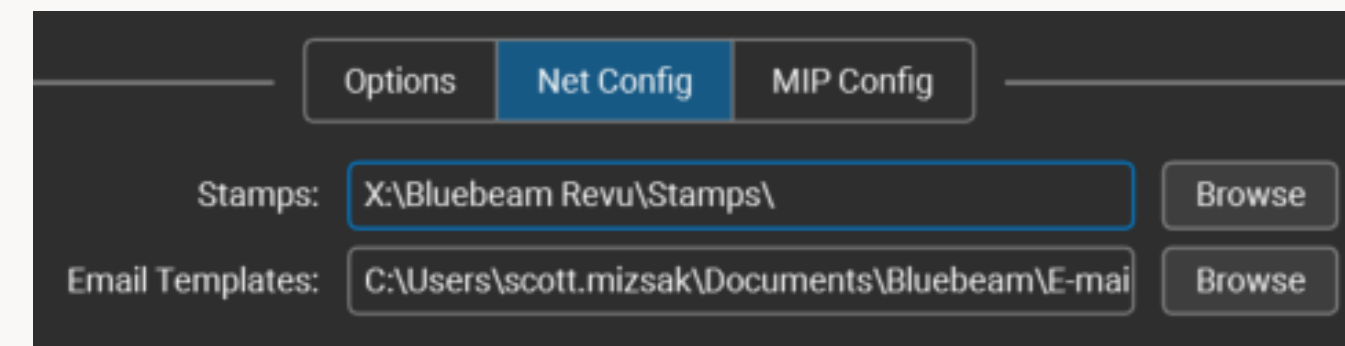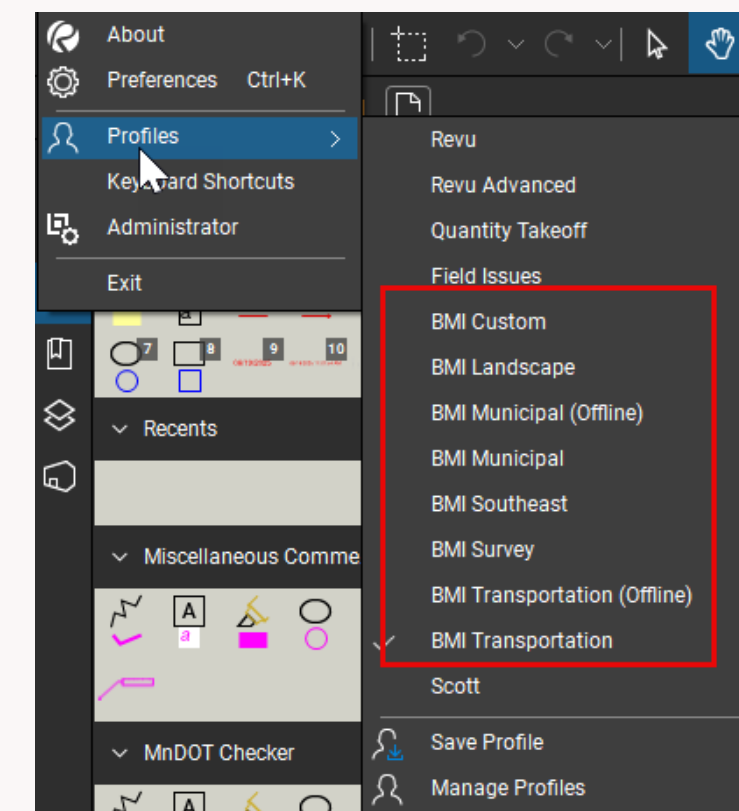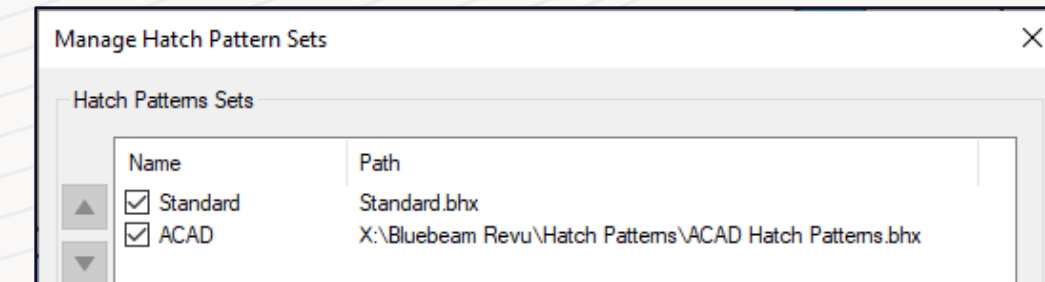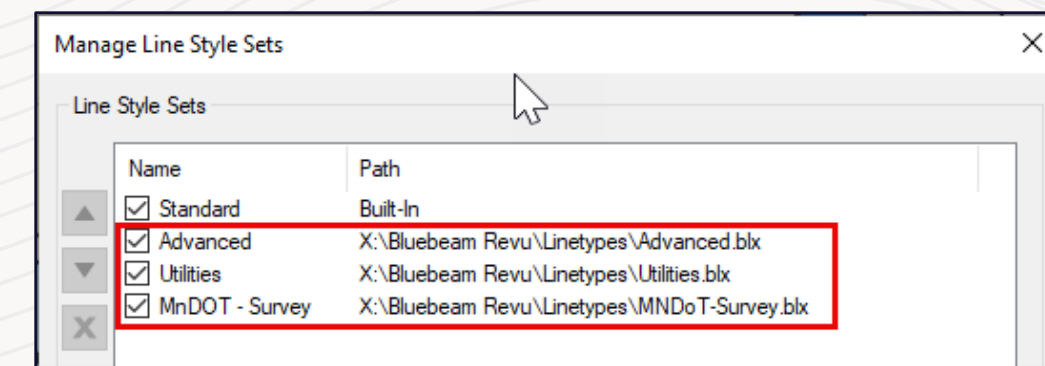
Background:
- Consistency is critical for any company to be successful
- Making sure everything looks the same, regardless of what office it came from
- Ensuring the same workflow is followed office to office

Process:
- Stamp Folder is set to a network drive
- Created Custom Profiles for each discipline
- Created Custom Toolsets that were Added (Not Inserted) to each profile
- Custom Status Managers, Linetypes, and Hatches were also created
- A Custom Batch Routine was deployed to load everything after the install

Problem:
- Users that did not use a Bolton & Menk profile
- Users that tried to edit the Toolsets (LOCK file)
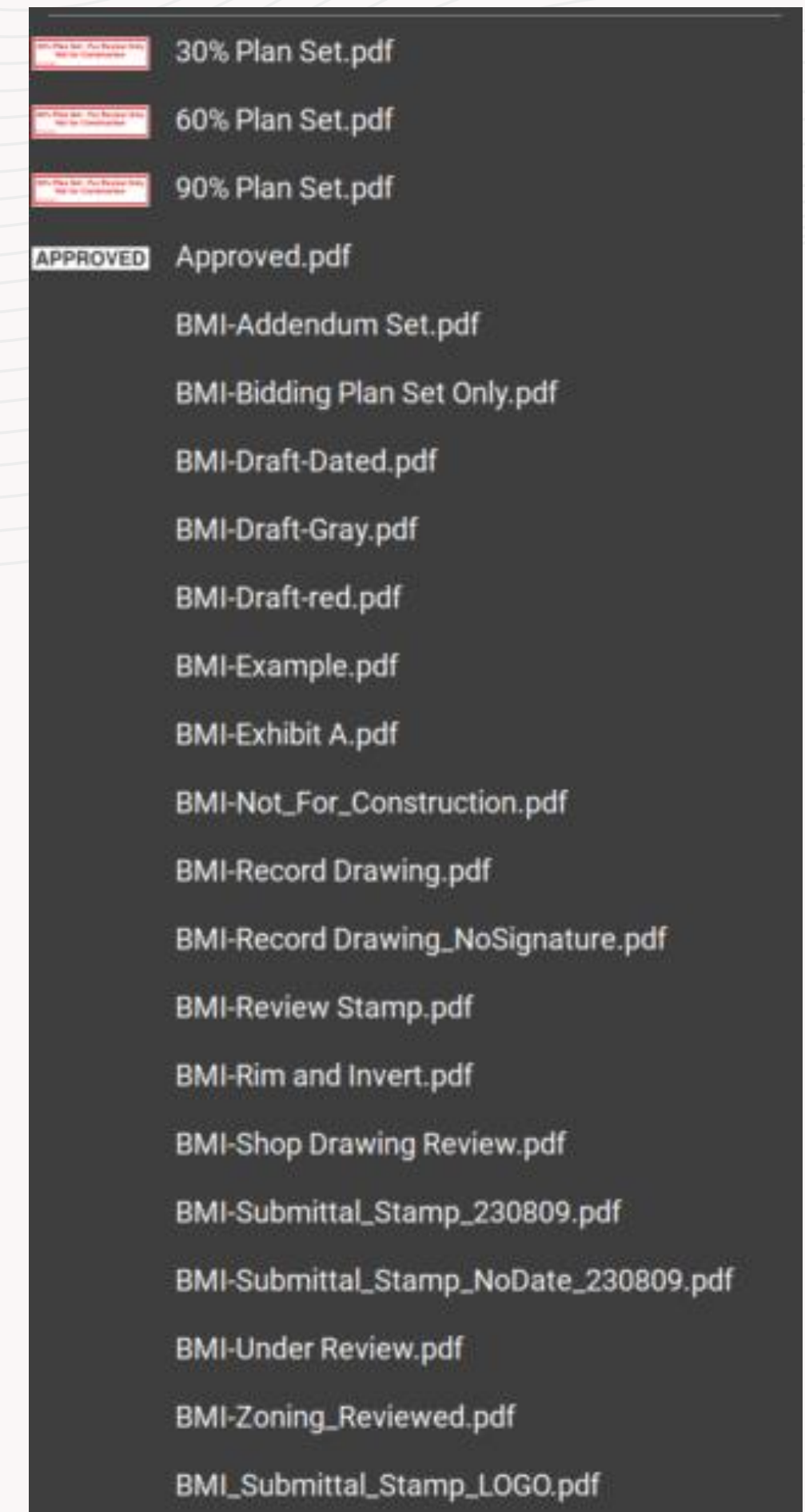
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Standards

How did I get everyone to use the same tools

Solution:
- Stamps on a network drive

Why:
- Everyone uses the exact same stamp
  - Had 7 different versions of the exact same stamp prior
  - Committee in charge of the Go – No Go
- Discipline specific stamps can be added to a Toolset

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Standards

Java Scripting

Solution:
- Color is always better

Why:
- Ability to track the status of the checklist
- Easier to review what still needs to be completed

Options
Item:
`NS`   Add
Export
`NS`
Item List:
- C
- IP
- NA
- NS

JavaScript Editor

```
Code

var f = event.target;
var fv = event.value;

if (fv == "C") {
    f.fillColor = color.green;
}
else if (fv == "IP") {
    f.fillColor = color.yellow;
}
else if (fv == "NS") {
    f.fillColor = color.red;
}
else if (fv == "X") {
    f.fillColor = color.white;
}
```

Two Guys and a Garage — Performance

BOLTON & MENK, INC.
Municipal Plan Review Checklist

BMI Project #: _____   Date: _____
Client: _____   Project Manager: _____
Project Name: _____   Plan Reviewer: _____

NS - Not Started   C - Complete
IP - In Progress   NA - Not Applicable

GENERAL PLAN REQUIREMENTS
- NS Annotation Height Per CAD Manual
- NS Annotation Orientation Per CAD Manual
- NS Client Logo if Required
- NS Client Name
- NS Client Project Number if Required
- NS Correct Office Address
- NS Correct Spelling
- NS Designed By / Drawn By / Checked By
- NS Engineer Name, License #, and Signature Date
- NS Licensed Professional Signature
- NS North Arrow Up or to the Right
- NS Project Name
- NS Project Sheet Border
- NS Revision Block Entries Per CAD Manual
- NS Scale Bar Included / Verify Consistent Scale
- NS Sheet Numbering Type (CSI Vs. Numeric)
- NS Stationing uses Positive Values

G-0 TITLE SHEET
- NS Bid Location/Stockpile Site/Etc. If Required
- NS Client Name
- NS List of Major Contract Items
- NS Project Date of Plan (Month/Year)
- NS Project Datums and Benchmarks
- NS Project Limits / Location Labeled on Map
- NS Project Location (City, State)
- NS Project Location Map Legend
- NS Project Location Map with Scale & North Arrow
- NS Project Title
- NS Resource List - Verify
- NS Sheet Index - Verify
- NS Signature Block for Reviewing Agencies If Required
- NS Total Sheet Number - Verify
- NS List of Major Contract Items

G-0 LEGEND & GENERAL NOTES
- NS Modified or Additional Legend Items if Required
- NS Project Specific Notes If Required
- NS Standard Legend Sheet

G-1 STATEMENT OF ESTIMATED QUANTITIES
- NS Bid Items are Current and Included
- NS Item Numbering is Continuous
- NS Sort Bid Items per Transport Item List if Required
- NS Tabulation References are Correct

C-0 EXISTING CONDITIONS
- NS *Baseline Alignment & Stationing*
- NS Private Utilities (Quality Level On or Off)
- NS Property Addresses
- NS Right-of-Way, Easements, and Lot Lines
- NS Sanitary and Storm Invert Information
- NS Sewer, Water, Storm Utilities
- NS Soil Boring Locations with Labels
- NS Street Names
- NS Surface Features – Trees, Landscaping, Walls, Etc.
- NS Text Is Legible – No Overlap

C-0 REMOVALS
- NS *Baseline Alignment & Stationing*
- NS Clearing & Grubbing Callouts
- NS Clearing & Grubbing Scope is Consistent with Proposed Construction and Utility Impacts
- NS Concrete Curb, Walk and Driveway Removals
- NS Grading & Construction/Project Limits
- NS Note All Removals to be Done by Others
- NS Note Utility Relocations to be Done by Others
- NS Pavement Reclamation/Removal Hatch
- NS Private Utilities (Quality Level On or Off)
- NS Property Addresses
- NS Removals Legend – Consistent with Plan
- NS Right-of-Way, Easements, and Lot Lines
- NS Sewer, Water, Storm Removals
- NS Street Names
- NS Text & Hatches are Legible – No Overlap

* Note: On 25 scale plans, stationing shall not be abbreviated (15+00).
On 50 scale plans, abbreviated stationing may be used when space is an issue (15).

Page 1 of 5

Rev. 3/2021

UNBOUND

Standards

How did I get everyone to use the same tools

Solution:

- Batch routine was updated to set a Bolton & Menk Profile
- Toolsets were built to look at a network drive so they would auto update
  - File location was lock and set to Read-Only
  - Updates made on a quarterly basis or as needed
- New Profiles were pushed with version updates
  - Off cycle as needed (Manual Process)
- Had to check for LOCK files every morning


```
@Echo Off
Echo "Installing custom Profiles, Hatches and Linework for BB Revu"
"C:\Program Files\Bluebeam Software\Bluebeam Revu\21\Revu\Revu.exe" /s /bpximport:"\\bolton-menk.com\drives\x\Bluebeam Revu\Profiles\BMI Custom.bpx"
/bpximport:"\\bolton-menk.com\drives\x\Bluebeam Revu\Profiles\BMI Landscape.bpx" /bpximport:"\\bolton-menk.com\drives\x\Bluebeam Revu\Profiles\BMI Municipal
(Offline).bpx" /bpximport:"\\bolton-menk.com\drives\x\Bluebeam Revu\Profiles\BMI Municipal.bpx" /bpximport:"\\bolton-menk.com\drives\x\Bluebeam
Revu\Profiles\BMI Southeast.bpx" /bpximport:"\\bolton-menk.com\drives\x\Bluebeam Revu\Profiles\BMI Survey.bpx" /bpximport:"\\bolton-menk.com\drives\x\Bluebeam
Revu\Profiles\BMI Transportation (Offline).bpx" /bpximport:"\\bolton-menk.com\drives\x\Bluebeam Revu\Profiles\BMI Transportation.bpx" /bpxactive:"BMI
Custom.bpx"/bhxadd:"\\bolton-menk.com\drives\x\Bluebeam Revu\Hatch Patterns\ACAD Hatch Patterns.bhx" /blxadd:"\\bolton-menk.com\drives\x\Bluebeam
Revu\Linetypes\Advanced.blx"/blxadd:"\\bolton-menk.com\drives\x\Bluebeam Revu\Linetypes\MNDoT-Survey.blx"/blxadd:"\\bolton-menk.com\drives\x\Bluebeam
Revu\Linetypes\Utilities.blx"

reg import "%~dp0\bb21regset.reg"
cls
echo off
echo "Bluebeam Revu 21 Post Installs have completed"
pause
```

BMI-Landscape Markups.btx	5/22/2024 12:40 PM	Bluebeam Revu To...	24 KB
BMI-Landscape Symbols.btx	8/8/2022 12:17 PM	Bluebeam Revu To...	406 KB
BMI-Landscape Utilities.btx	8/9/2022 7:28 AM	Bluebeam Revu To...	8 KB
BMI-Low Salt.btx	2/20/2025 2:28 PM	Bluebeam Revu To...	1,703 KB
BMI-Redline-Sanitary.btx	6/27/2023 10:10 AM	Bluebeam Revu To...	13 KB
BMI-Redline-Storm.btx	6/27/2023 10:09 AM	Bluebeam Revu To...	19 KB

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Question

Who uses Deployments to install Bluebeam Revu?
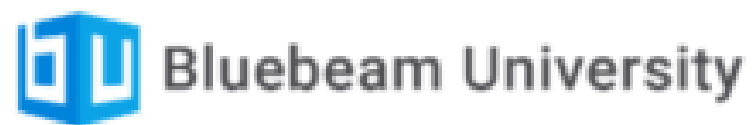Do you have custom content

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Standards

Training

Background:

- With over 1,200 users now, training can be difficult

Options:

- Bluebeam University
- Eagle Point (Pinnacle)
- Recorded training on our Intranet Page
    - Bluebeam Revu Basics
    - Studio Session – Studio Projects
- White papers on our Intranet Page
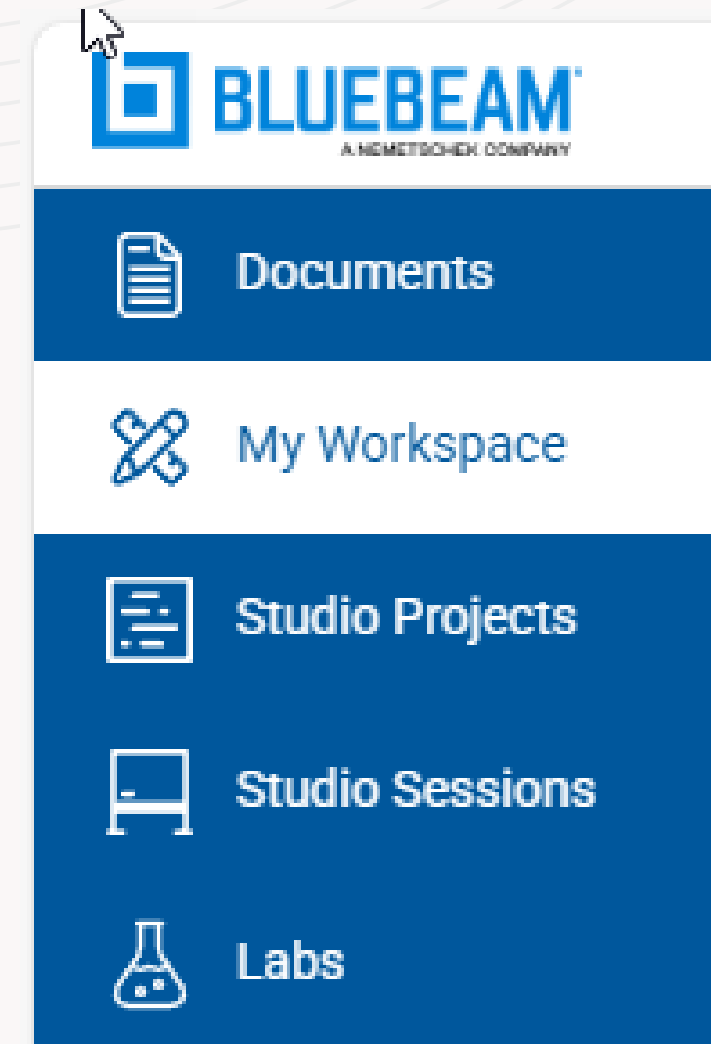- In-person training when office visits are done (1 hr. typically)

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Training

Transitioning from Revu for the iPad to Bluebeam Cloud

Functionality:

Studio Projects

Studio Sessions

Measurements

Punchlists

Updates

What has worked to keep users on the current version

Problem:

- Remember when we said only 176 out of 1000 people opened the link in the email

Solution:

- Through the Preferences - a Startup PDF is opened at launch
  - Now they are forced to see any news that I want to post about.

Updates

What has worked to keep users on the current version

Startup.pdf:
- Bluebeam News & Updates
  - Current Version
  - Beta Testing of version
  - New Features
- Bluebeam Tips & Tricks
  - Troubleshooting
  - How to use uncommon command
  - Proper workflow for Bolton & Menk
- Links to all three training sites
  - Bluebeam University
  - Pinnacle Series
  - Bolton & Menk Intranet page

Problems:
- User are now complaining that they have to close the Startup.pdf

Updates

What has worked to keep users on the current version

Problem with Software Updates:

- Users do not have Admin rights to install software on their machine

Solution:

- Place the install files in Software Center (SCCM) with elevated privileges.
  - Install at their convenance.
- Turned off the Auto Update Notification

Property	Value
BB_AUTO_UPDATE	0
BB_DISABLEANALYTICS	1
BB_REVUPREFERENCES	W:_PDF Management\Bluebeam Revu\Revu_21\Deployment 21_3\RevuPreferences.xml
DISABLE_WELCOME	1
ALLUSERS	1

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Question

What is your opinion of pushing updates silently in the background

1: All for it

2: Depends on what it is

3: Absolutely not, get to much grieve from the users

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Wishlist

What features I would love to see Bluebeam to release

1: Distinguish between the **Complete** and **Complete Intern** License with Bulk Loading

2: Automatically reactivate a user during the load process
Do not delete their First and Last name

3: Ability to drop in a block with a leader

What features would you love to see Bluebeam to release?

1:

2:

3:

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Final Tip of the Class

Utilize your Sales Rep and your Customer Success Manager

1: Thank you to **Justin Kilner (Sales)**
and his predecessors for being able to have a quick turn around time on new seats

2: Thank you to **Jessica Haffner (CSM)**
for keeping us up to date on new features and assisting with any issues we run into.

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Conclusion

Recap of what has worked

Setup:
- Email everyone two weeks prior to major releases and updates
- Create a living document that is in the email as a link
- Create a Deployment to customize the settings of Revu

Assigning Licenses:
- Use the Bulk Load when there is more than 3 new users
  - Leave the license type blank when they get an Intern License.
  - Assign the license based on the department

Standards:
- Create custom Profiles
- Create custom Toolsets that are "Added"
- Create custom Status Managers

Updates:
- Create a pdf to load when Revu is Launched.
  - Can't trust that users will read an email.
  - Base the Tips and Tricks off the previous 2 months of support tickets

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QUESTIONS

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