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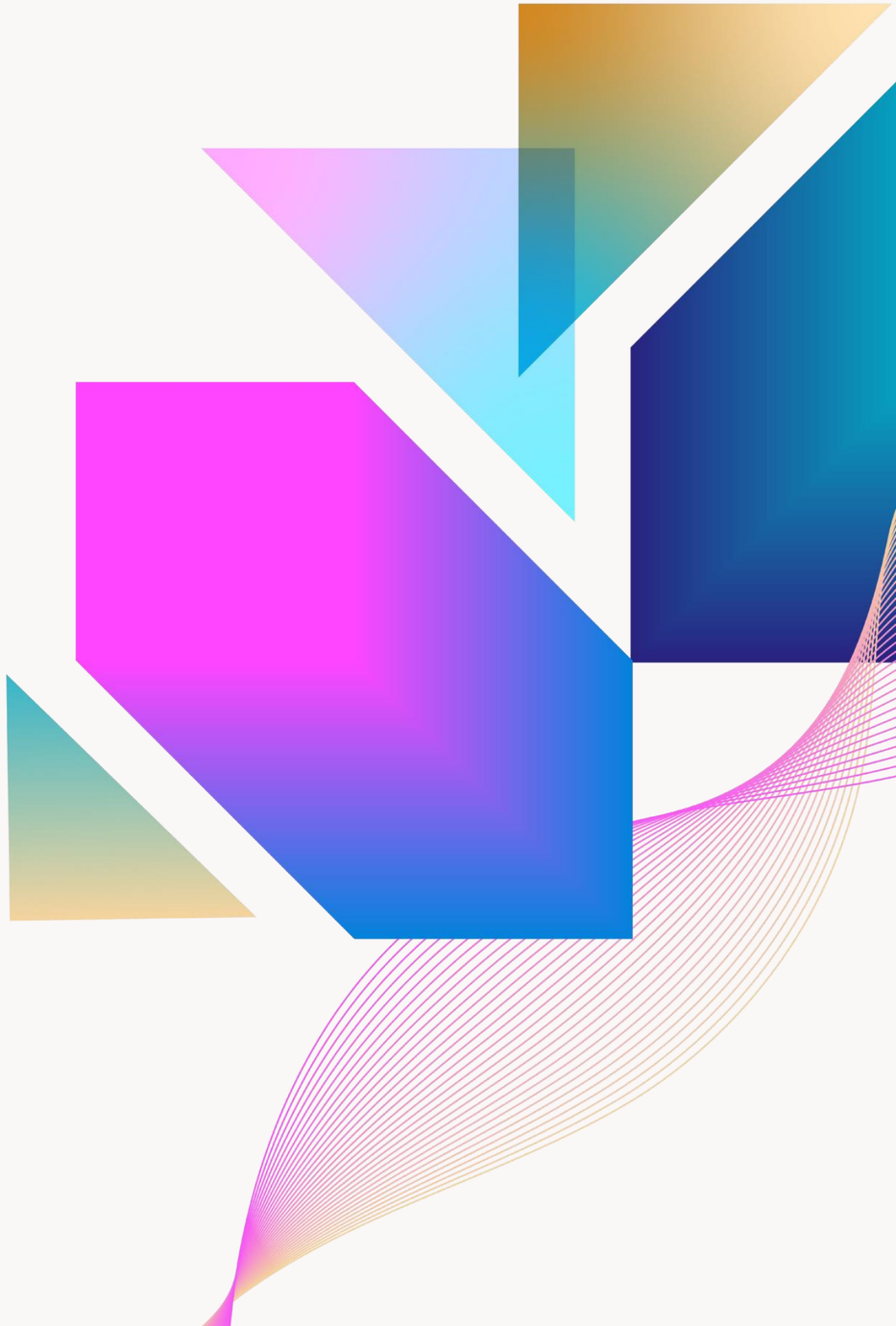
Customizations, Workflows & Best Practices: Streamlining Large-Agency Design Reviews & Permit Agency Reviews

Troy Barbu



Agenda

01 Introduction

02 Best Practices and Workflows: Implementation

- Workflow Setup

03 Starting Points for Bluebeam Customizations for Reviews

- Status Options

04 Large-Agency & Permitting Agency “Pain-Points”

- Completion of Review Options
- Comment Exporting “Hacks”

05 Top 10 Things you are doing WRONG in Bluebeam!

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Troy Barbu

Digital Solutions and Workflows

Current Role at AECOM - PPM West Digital Technical Lead

- Architecture Background
- Specialty: Project Lifecycle Digital Strategies: from Procurement through Design & Construction to Closeout & Facilities' Operations.
- Recognized as one of the top Bluebeam Implementation experts in the U.S.
- More than nine years of Bluebeam Implementations with AECOM
- Multiple CMAA Award Winner and Multiple Historic Preservation Award Winner

“My overall goal is CLARITY. When I have moved a client's understanding of technology from complex to intuitive - only then have I ‘done my job’. ”

12+ Years
Owner-Focused Digital Transformation / Implementations

9+ Years
Bluebeam SME

20+ Years
BIM Solutions & Management

20+ Years
Developing & Managing Teams

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Troy Barbu

Digital Solutions and Workflows

AECOM’s Global Subject Matter Expert (SME) for Bluebeam

(AECOM has approximately 51,000 employees worldwide)

12+ Years
Owner-Focused Digital Transformation / Implementations

9+ Years
Bluebeam SME

20+ Years
BIM Solutions & Management

20+ Years
Developing & Managing Teams

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Leading Digital Culture Change across the U.S.

CA Division of the State Architect

$6B/year, 2017-2018

San Bernardino Community College District

$500K, 2018

Los Angeles Unified School District

$7B bond 2017-2018

University of California San Diego

2021

Los Angeles Community College District

$6B bond 2017

City and County of San Francisco (DBI, Planning, Ports, etc.)

90,000 permits, 2021 - 2025

Department of General Services

2018

San Francisco Public Works

2025

Los Angeles World Airports

2022-2023

US Department of State

2022

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Best Practices and Workflows: Implementation

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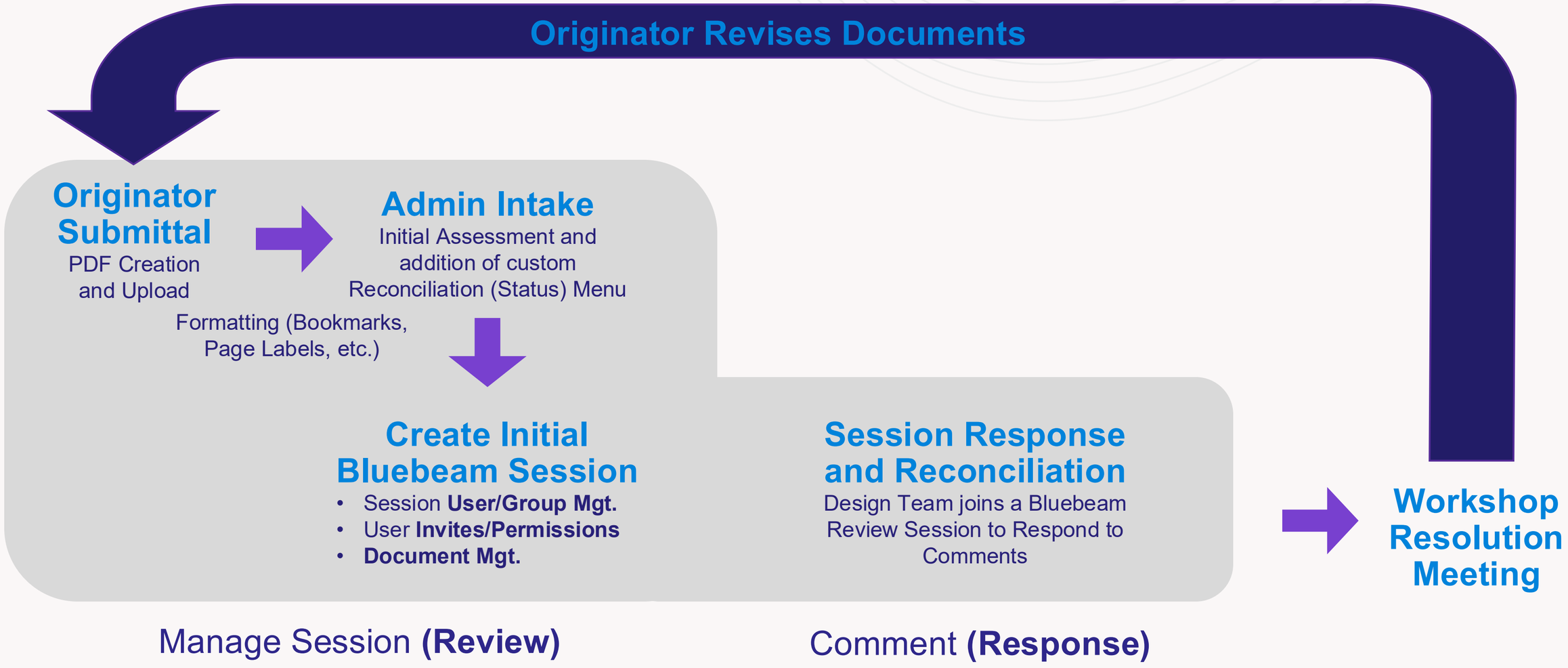
Bluebeam Review Workflow: Studio Session Setup



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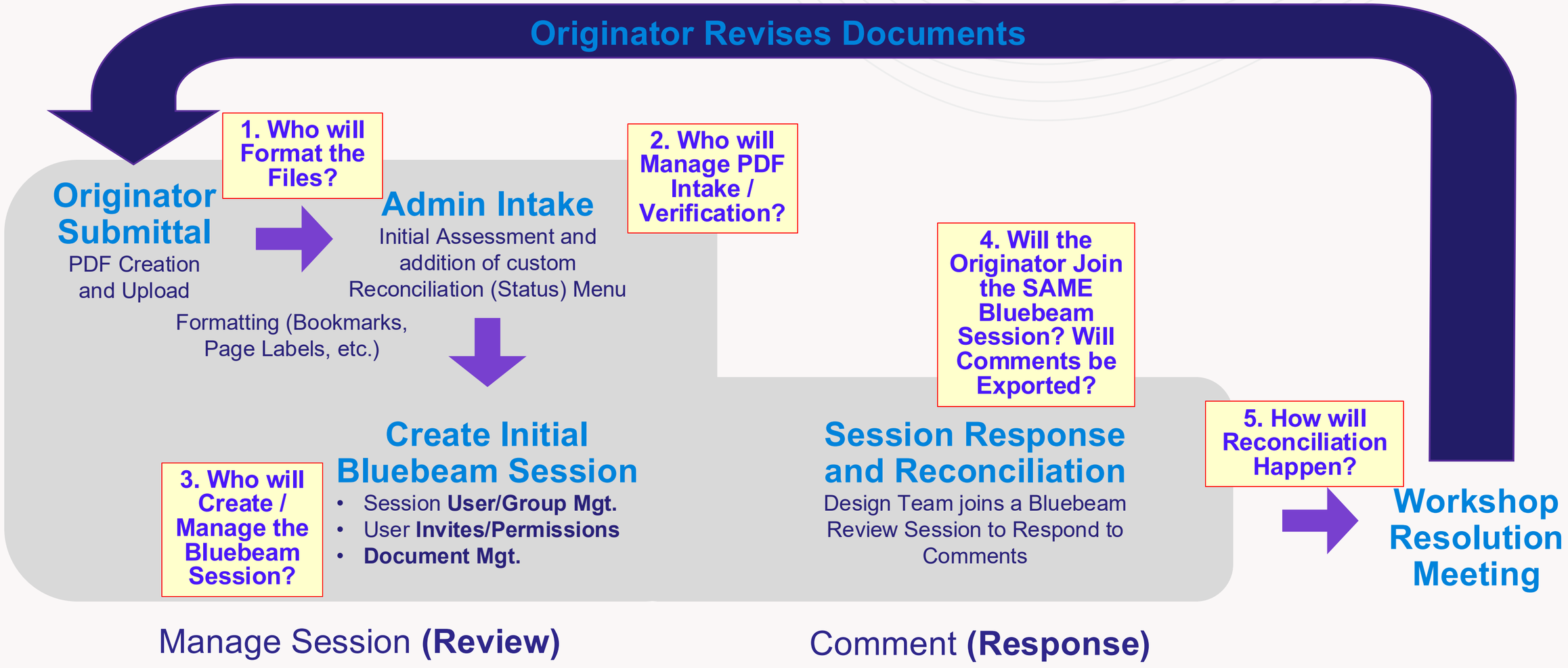
Bluebeam Review Workflow: Studio Session Setup



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Bluebeam Implementation

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Bluebeam Implementation

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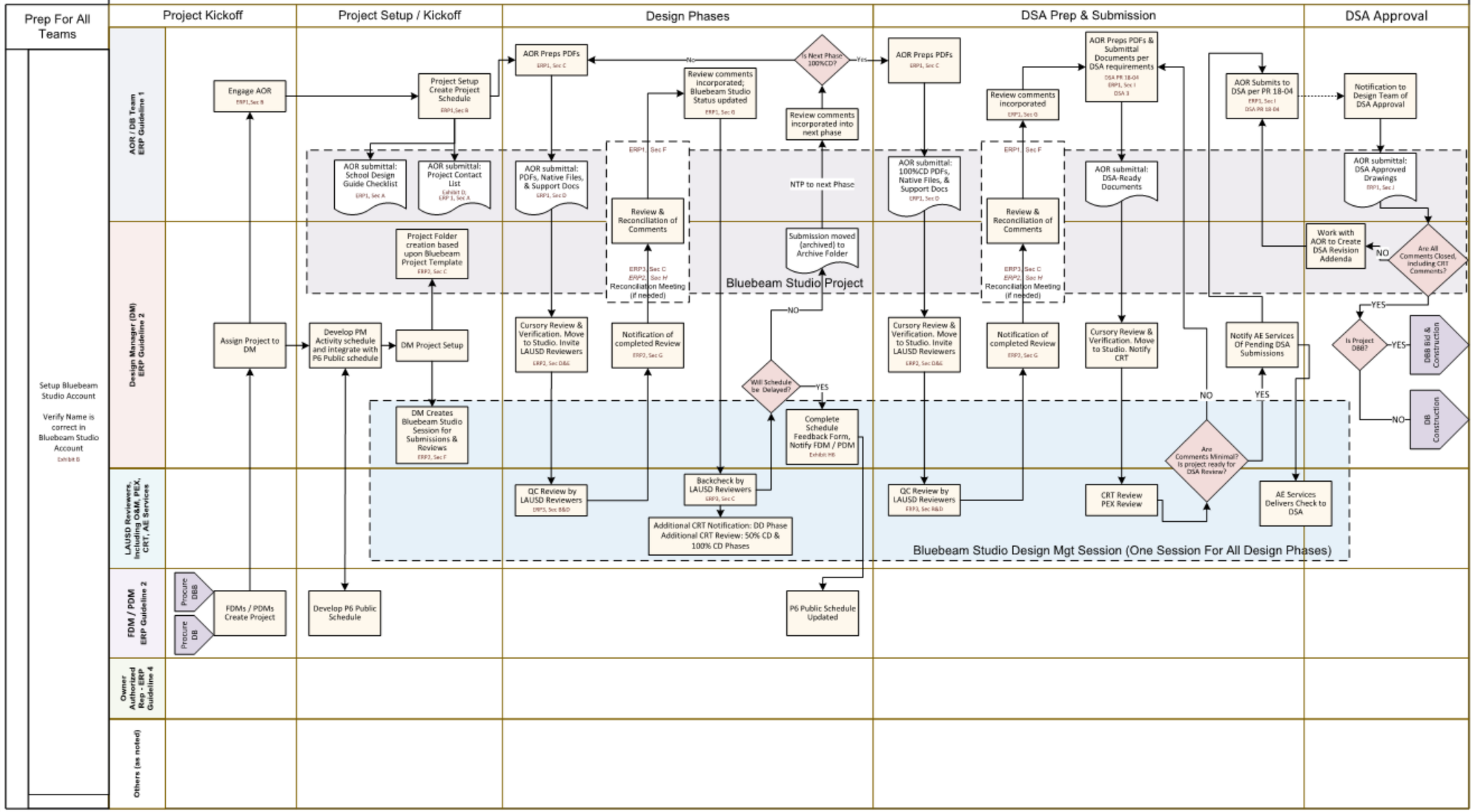
Exhibit A2 – Workflow for Design Build (DB)



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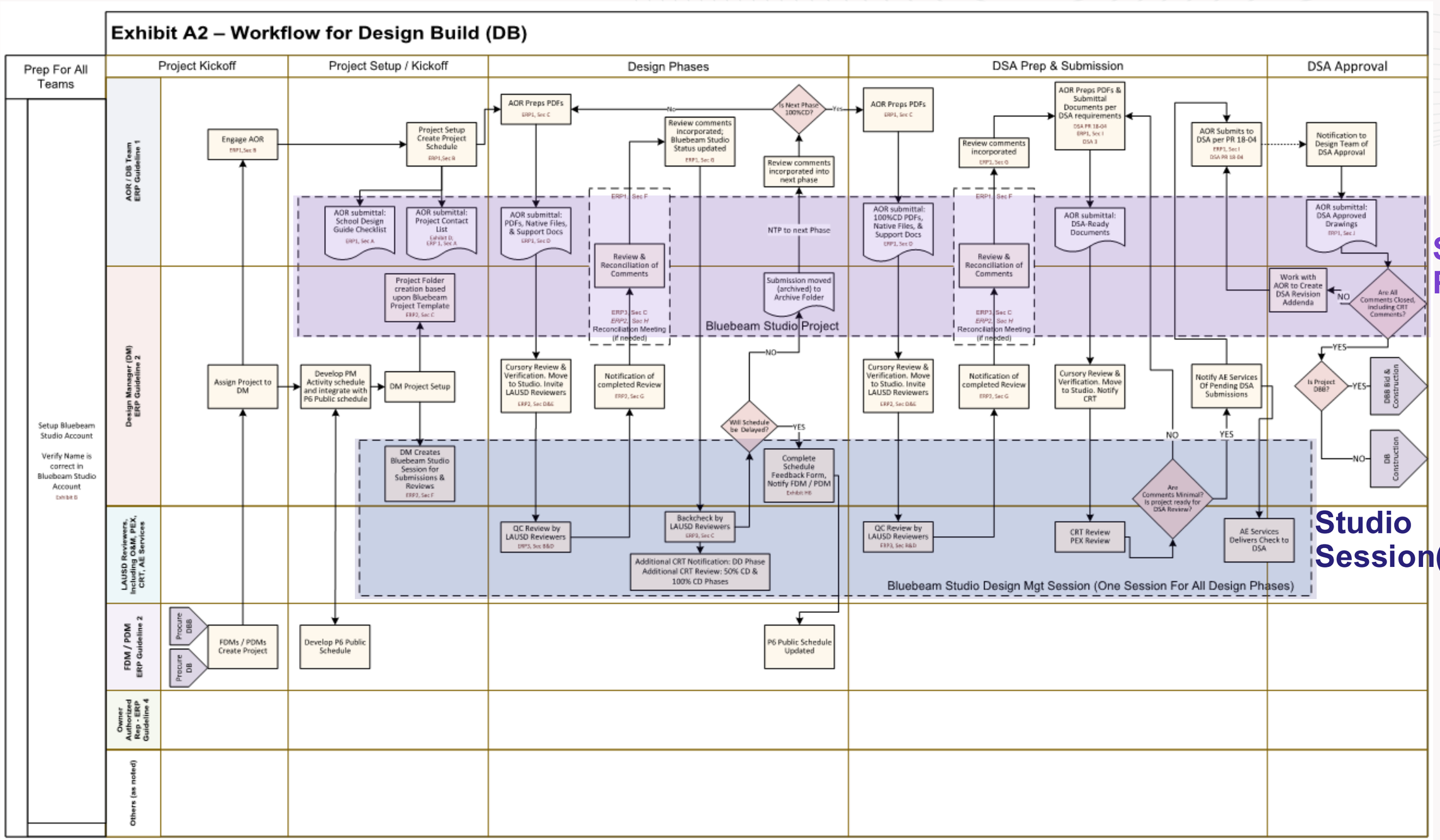

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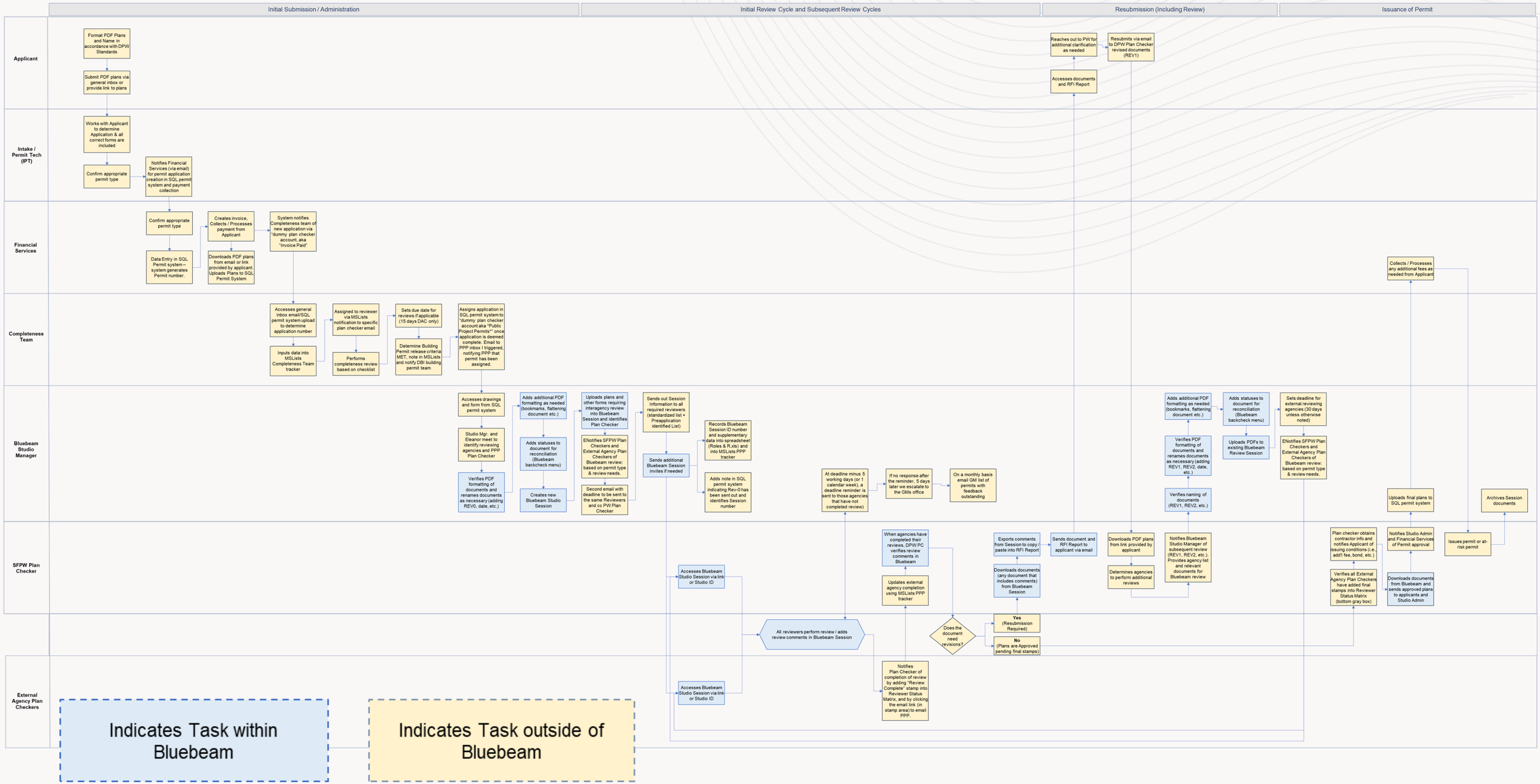
Bluebeam Studio Workflow – SF Public Works



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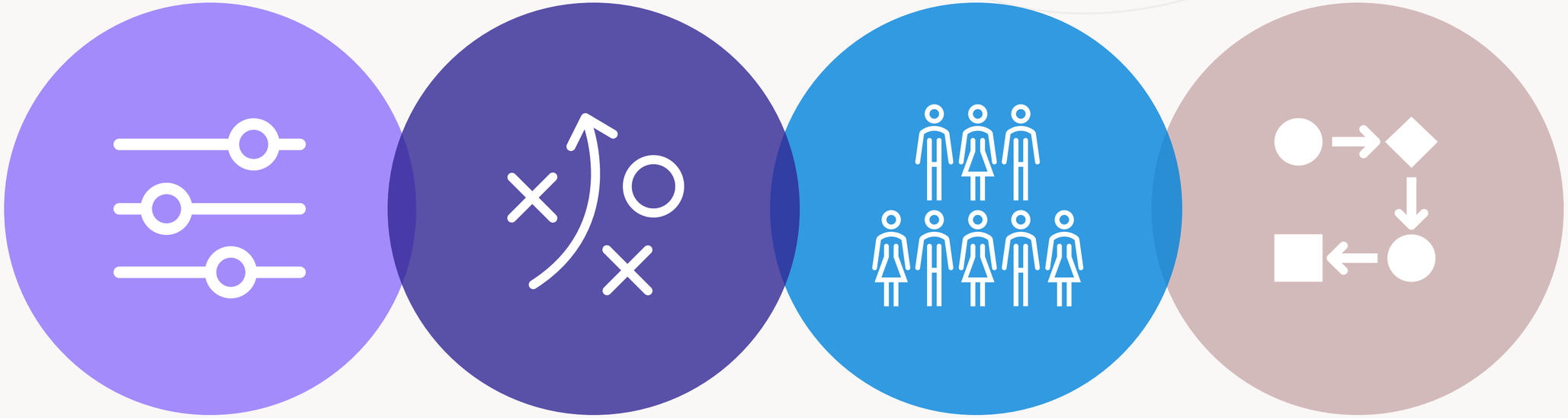
Why Workflow?

Workflow includes **all elements of the process** (such as portals, administration functions, ball in court, approval, etc.)

All groups defined as swim lanes on the left-hand side



Workflows are important for team members to **understand how they fit in**

Determine **software alignment** with the Roles / Responsibilities for each Team Member

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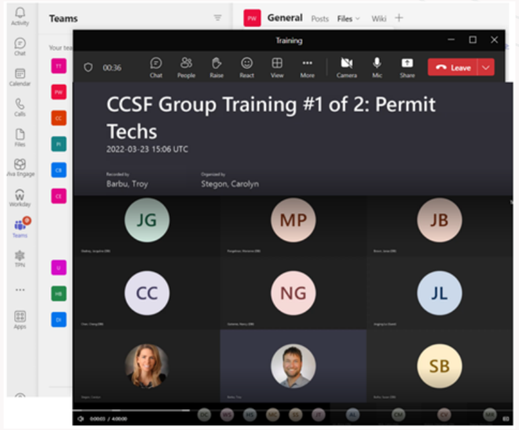
Training & Procedures

Training and Procedures are Built from the Workflow (Role-Based)

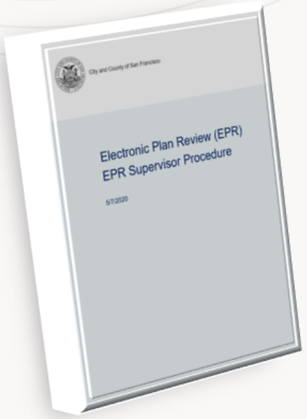
The Best Training is…

- **Cost effective**
- **Easy** to follow
- High **attendance/attention**
- **Instant feedback** from trainer(s) (training is active vs. passive)
- Can be viewed **anytime** (pulled)
- Can be viewed **anywhere**
- Can be watched over and over (**go at your own pace**)
- **Practical application** of lesson
- Time to **practice** (with reviews/reinforcement)
- Can be used as **reference**
- **Track progress** of students

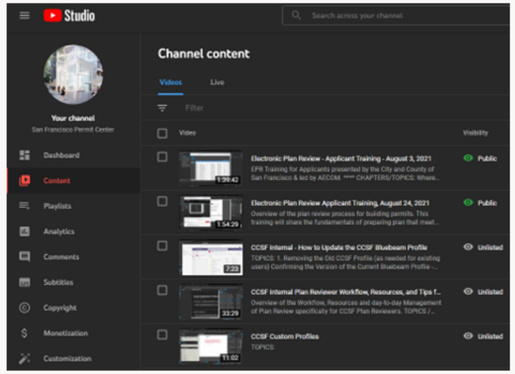
Synchronous



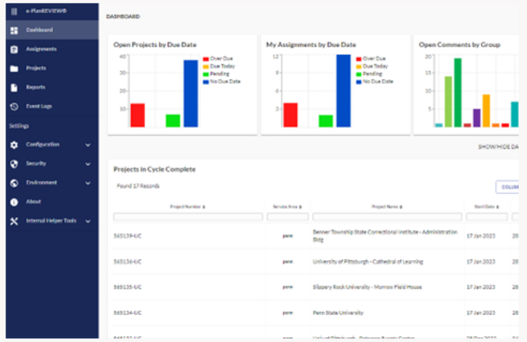
Manuals / SOPs



Asynchronous



Pilot Projects / Sandboxes



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Starting Points for Bluebeam Customizations for Reviews

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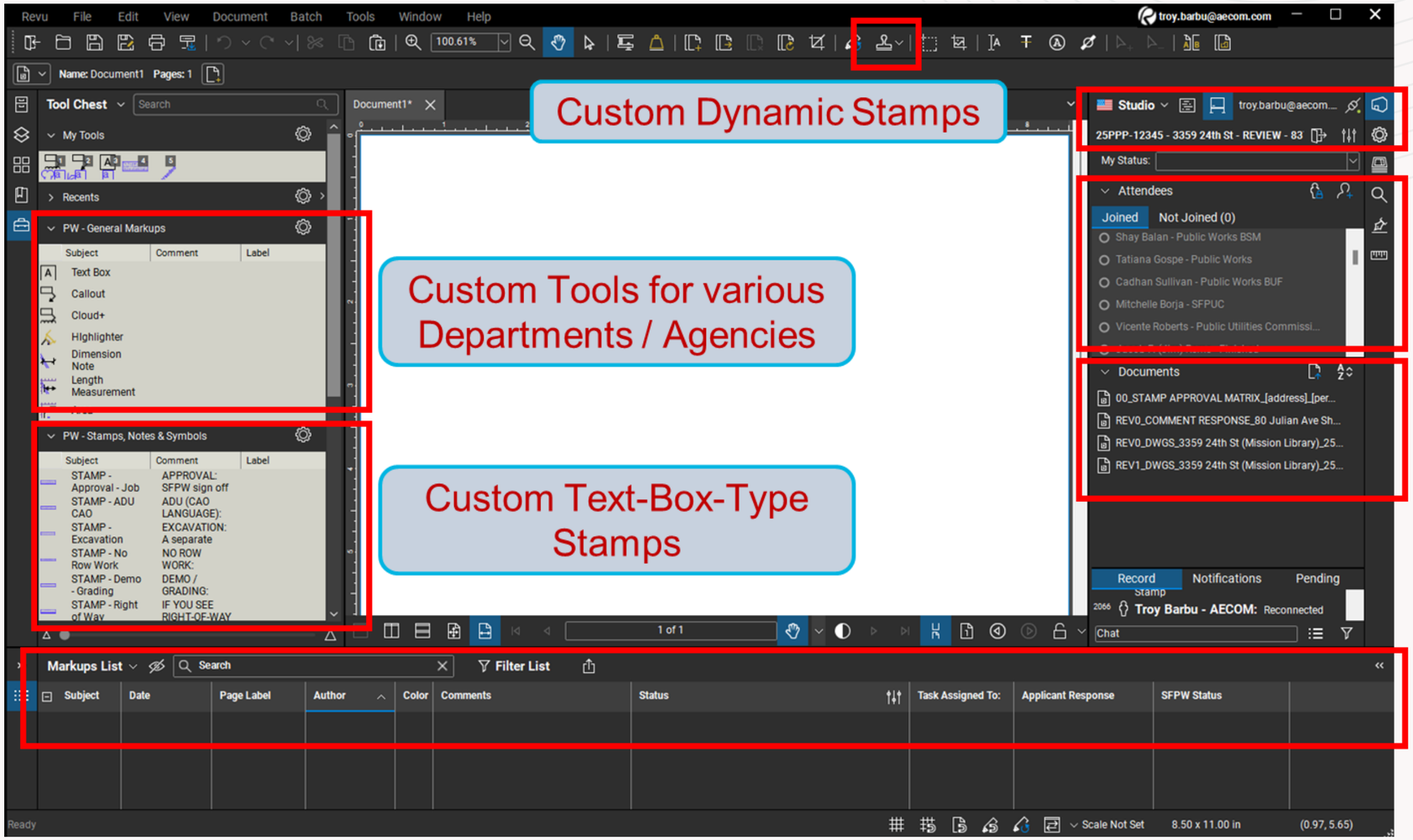
Goal: Create a Consistent Digital Platform



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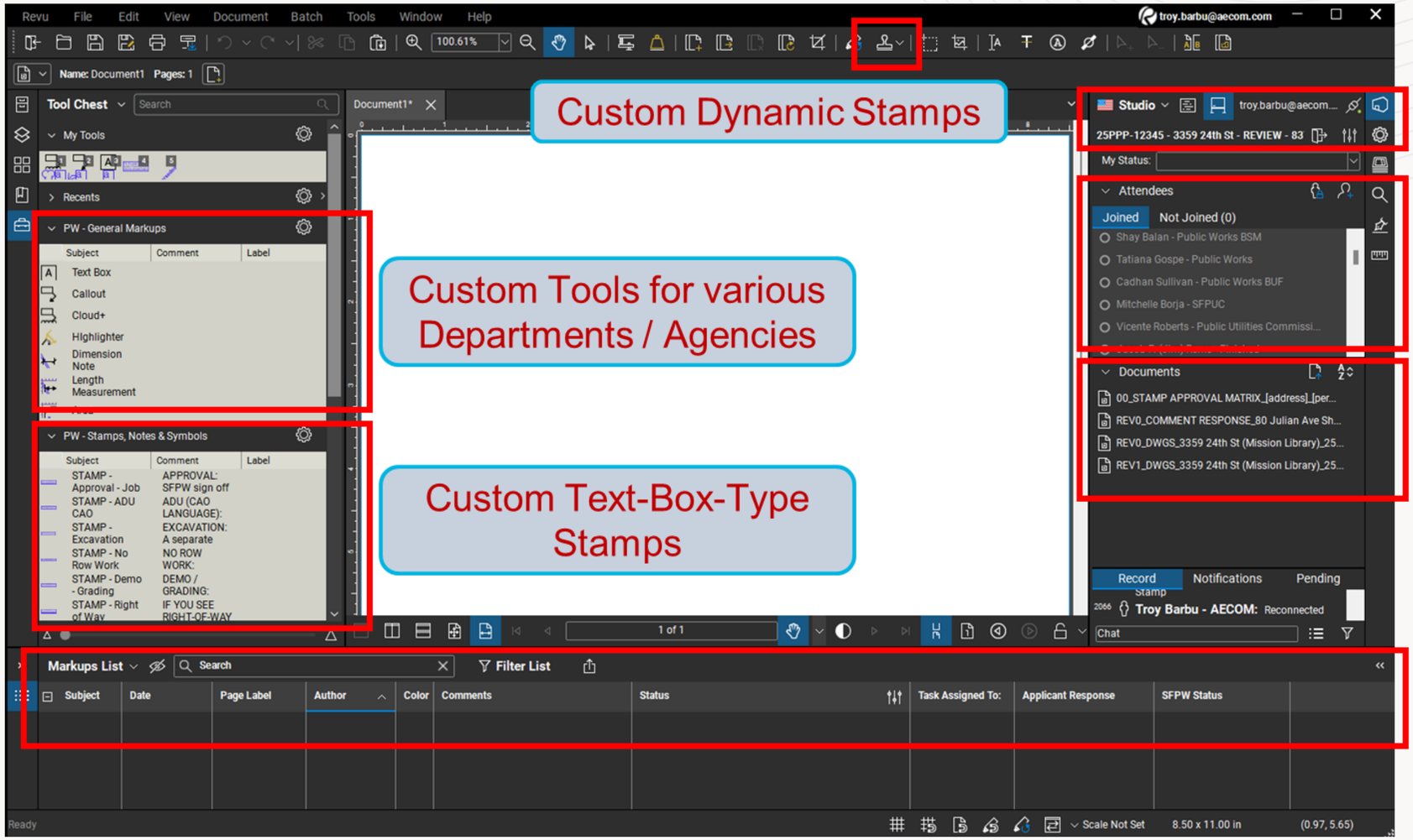

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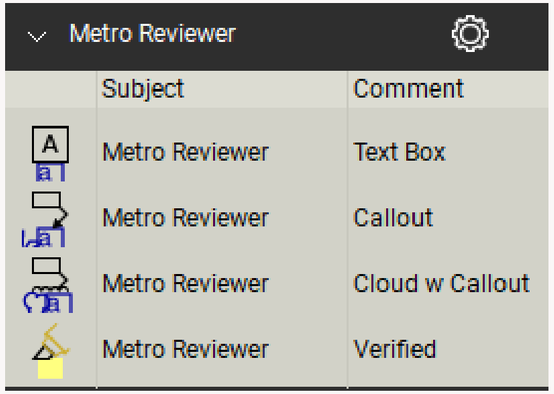
Bluebeam Review / Reconciliation Process (Statuses)



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Original Comment Added by Reviewer	Blue Comment
Status Selection by Design / Builder Team	**Comment Color (Change)**
** **RESPONSE to Reviewer Comment**	
1 - Agree: Incorporation Planned Next Submittal -	Green Comment
2 - Discussion / Clarification Required (see Reply) -	Orange Comment
3 - Not Applicable / No Action Required (see Reply) -	Red Comment
** **BACKCHECK Final Disposition (Completed by Reviewer)**	
RESOLVED - Review Comment Addressed / Complete -	Green Comment
UNRESOLVED - Review Comment NOT Addressed -	Red Comment
PENDING - Resolved Pending Confirmation (in next submittal) -	Orange Comment

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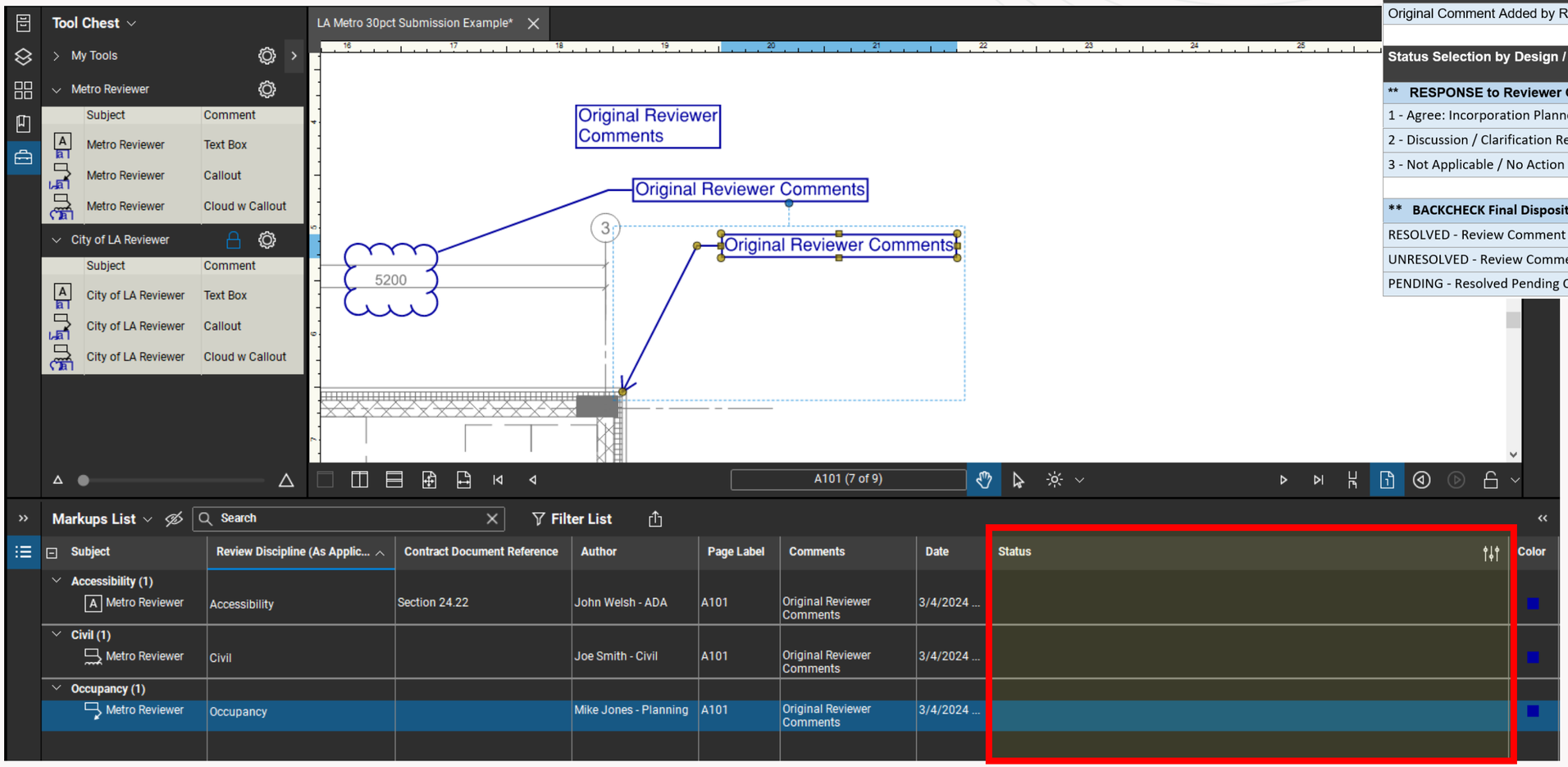
Bluebeam Review / Reconciliation Process (Statuses)

Step 1 - Digital Review Bluebeam Session: **Reviewers Add Comments**



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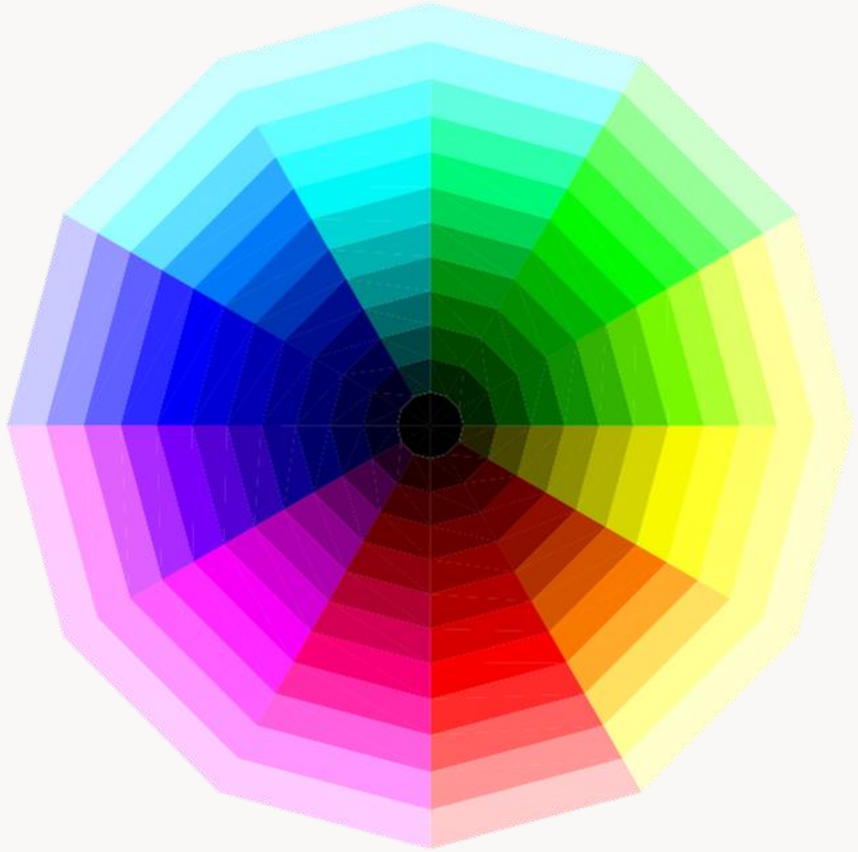
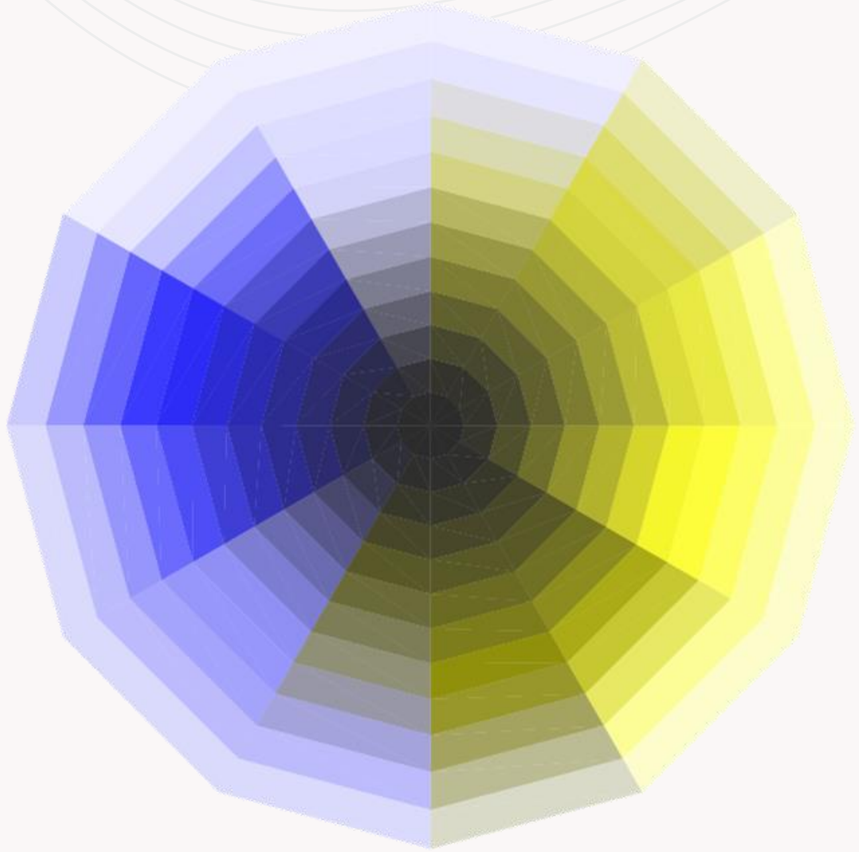
Normal Vision:



Common Color Blindness:



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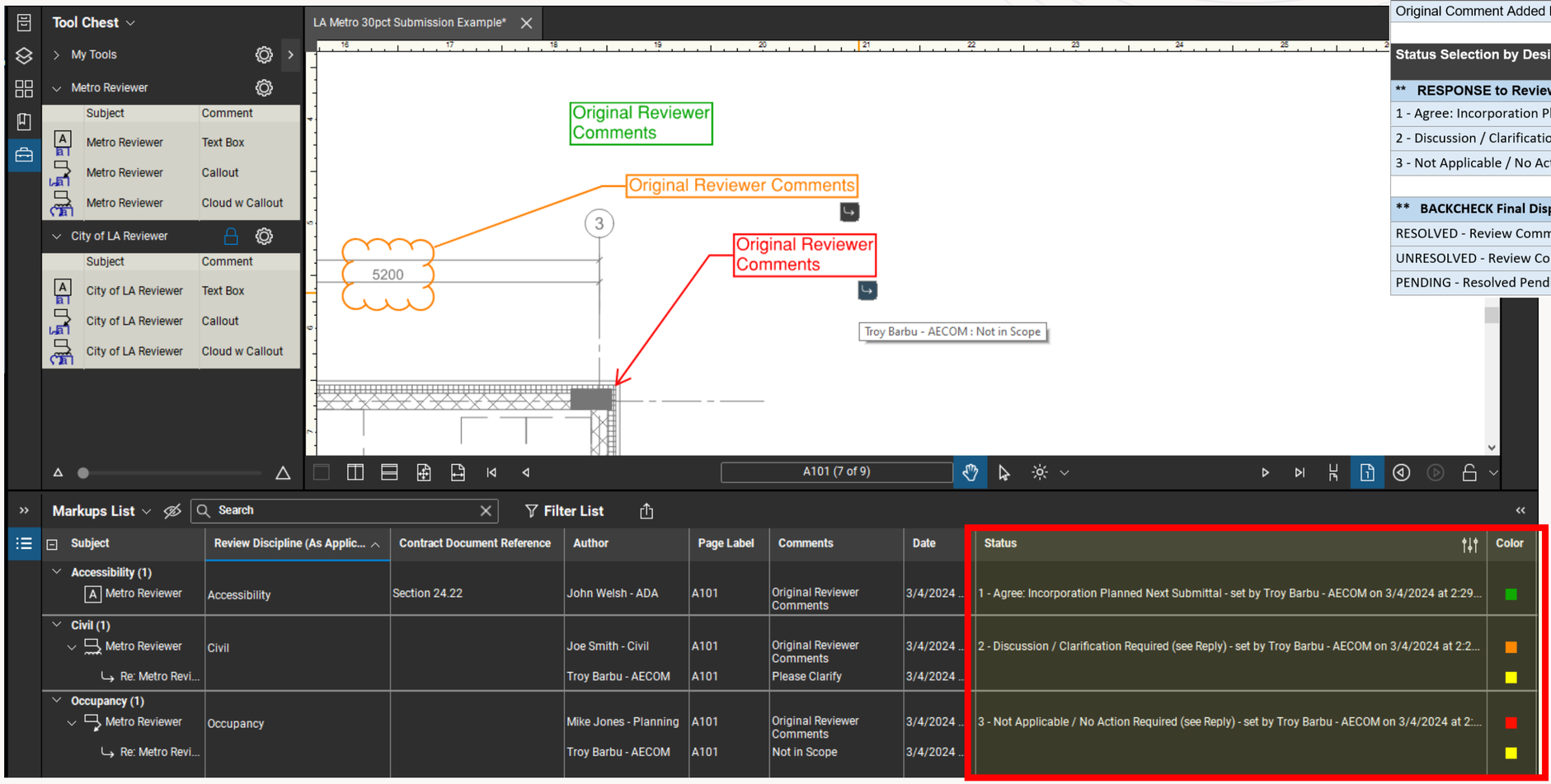
Step 2 - Digital Review Bluebeam Session: Design Team Responds



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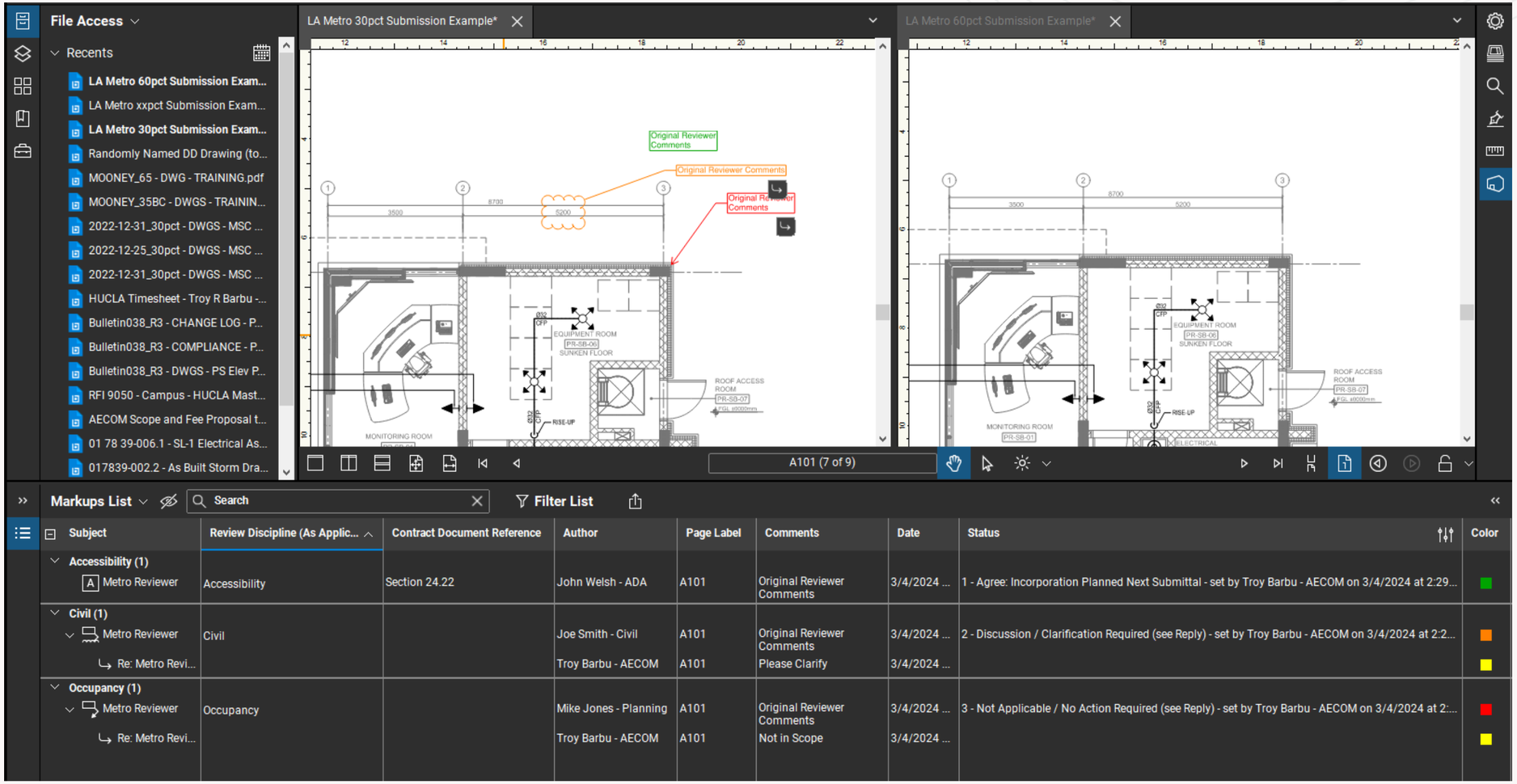
Step 3 - Digital Review Bluebeam Session: **Design Team Subsequent Submittal**



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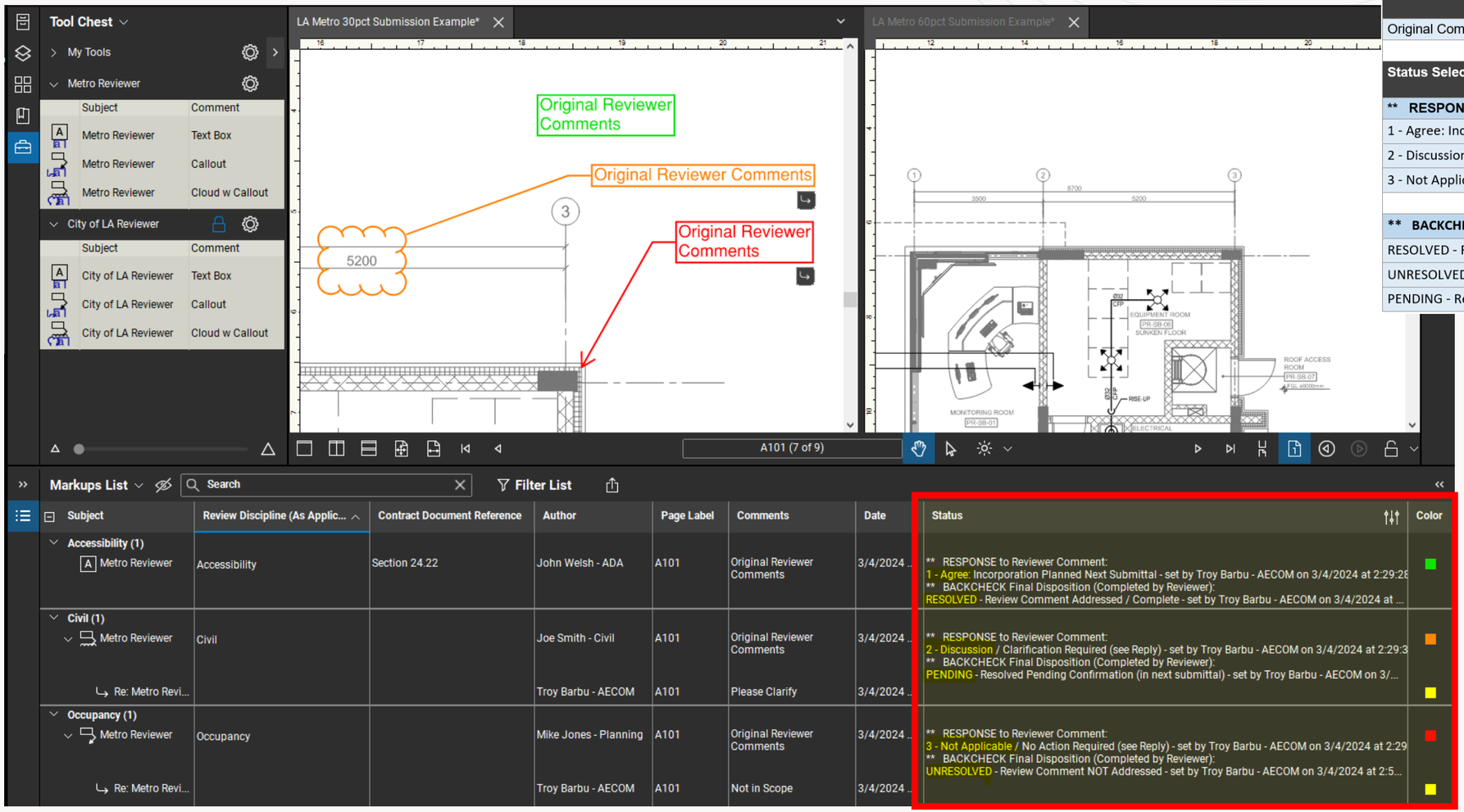
Step 4 - Digital Review Bluebeam Session: **Reviewer Backcheck**



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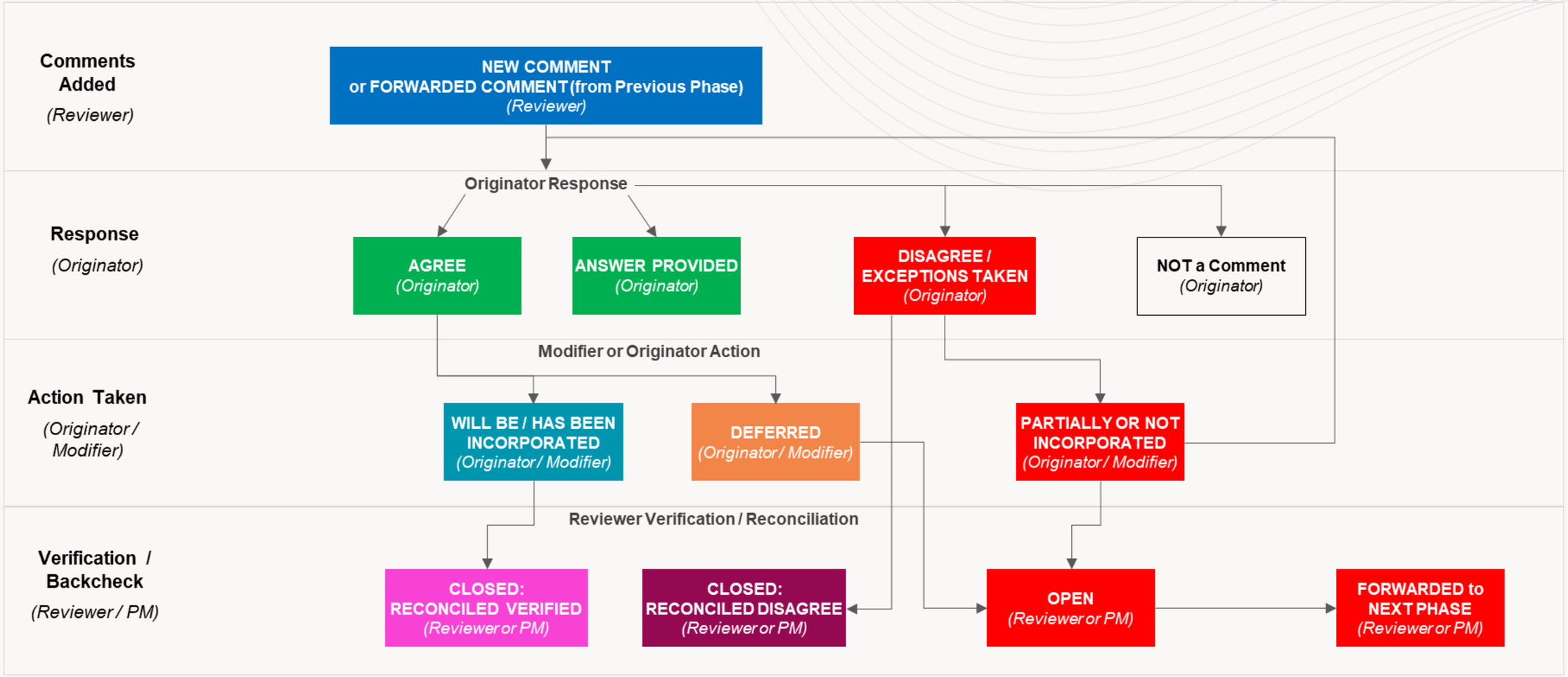

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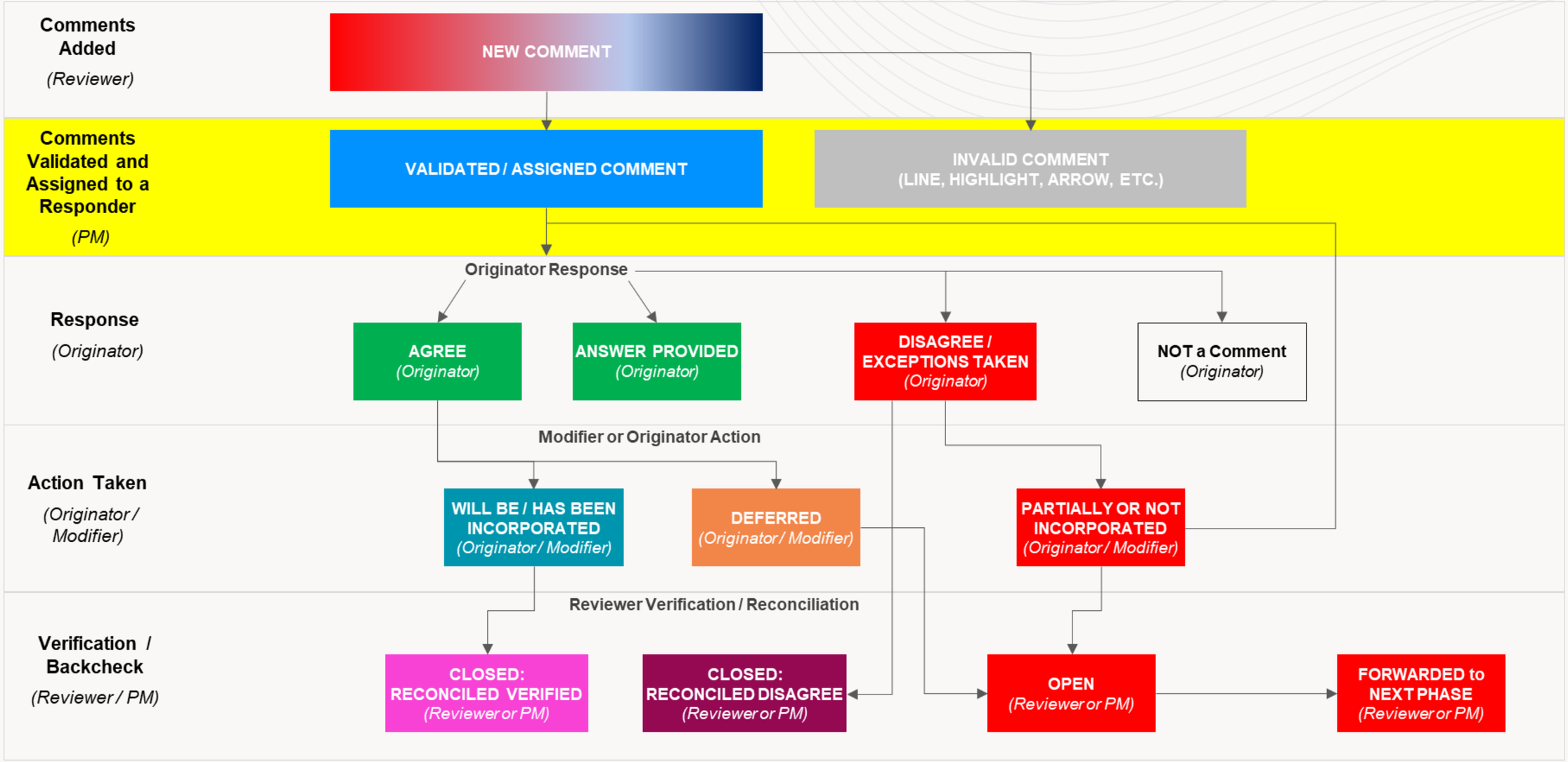

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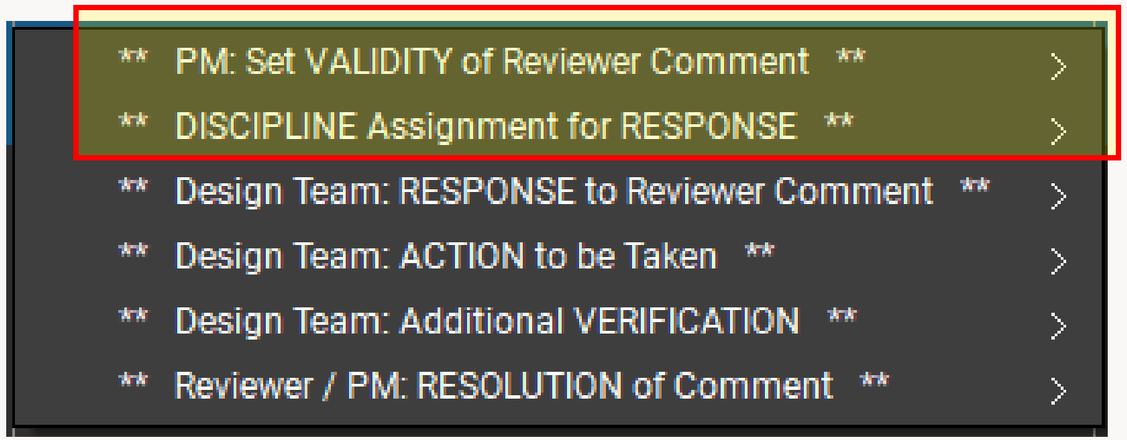

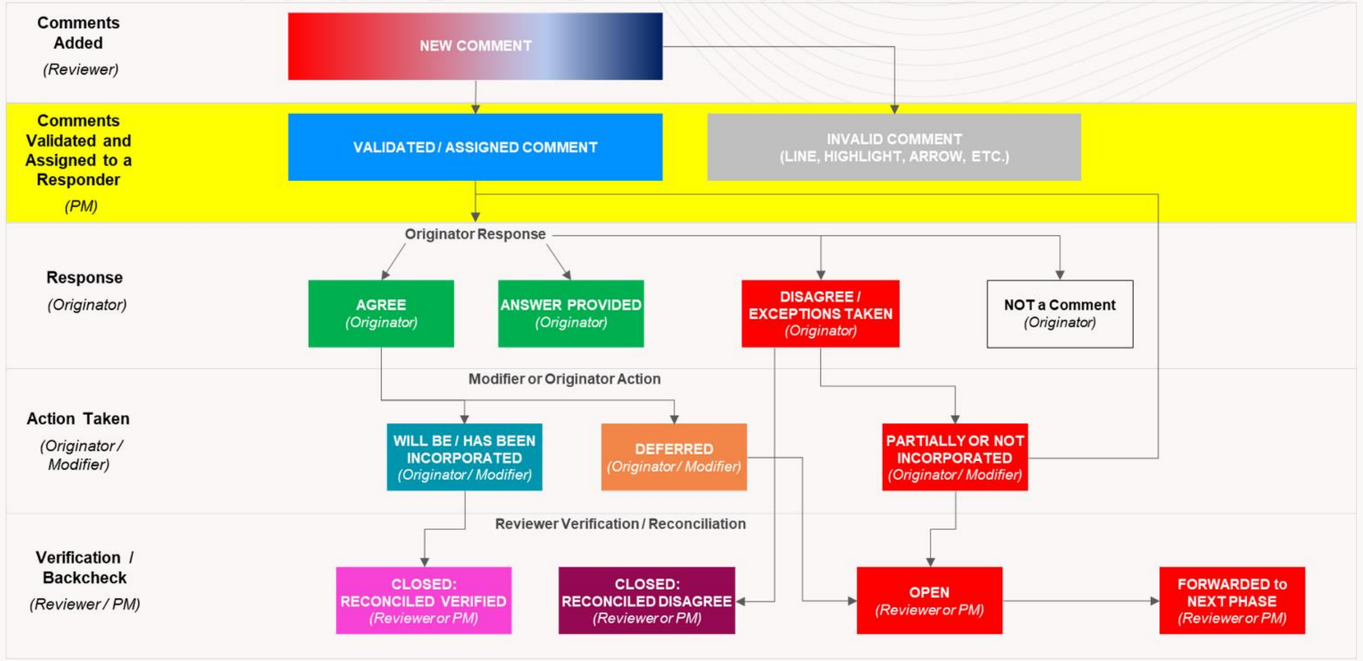

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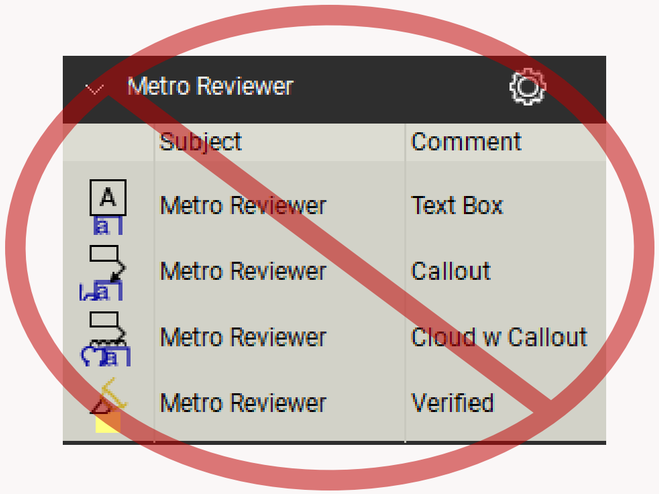
Reviewer Comment



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Callout	Marshall Pac...	C003 - GE...	Flagging this infrastructure here will need to be removed ahead of the planned excavation activities in this area	3/28/2025 10:24:55...	VALID: Assigned to CT - set by Rebecca Halbach - DXB on 5/2/...		
Re: Cal...	dan.tarasoff	C003 - GE...		5/7/2025 7:26:01 AM			John M, Dan T to review scope and revise specs and drawings as appropriate.
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Text	Joshua	C003 - GE...	Why aren't we remediating these roads and pads? - Joshua Linseman	4/11/2025 10:45:45...	VALID: Assigned to CT - set by Rebecca Halbach - DXB on 5/2/...		
Re: Text	dan.tarasoff	C003 - GE...		5/7/2025 7:21:03 AM			Andrew B
Re: Text	Pamela Gasc...	C003 - GE...		5/23/2025 10:13:25...			The extent of the roadway network adjacent to the B1 Pit will be reviewed as part of RevB.

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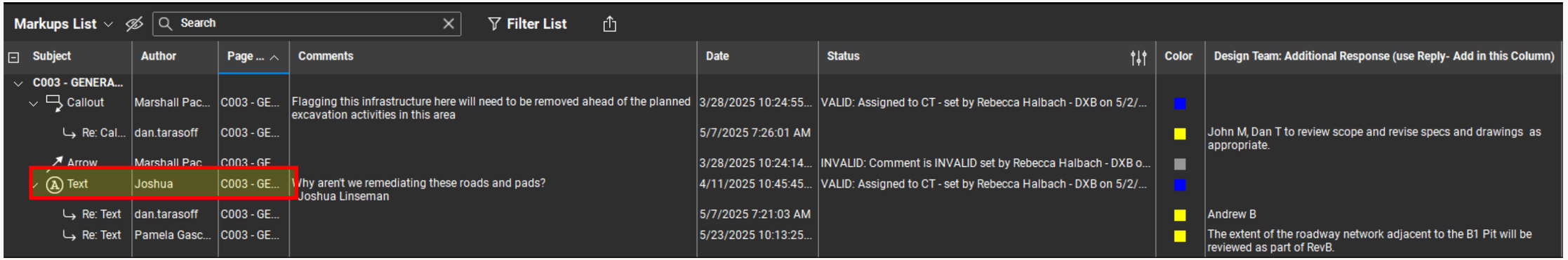

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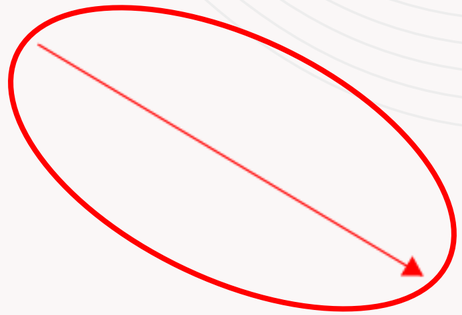

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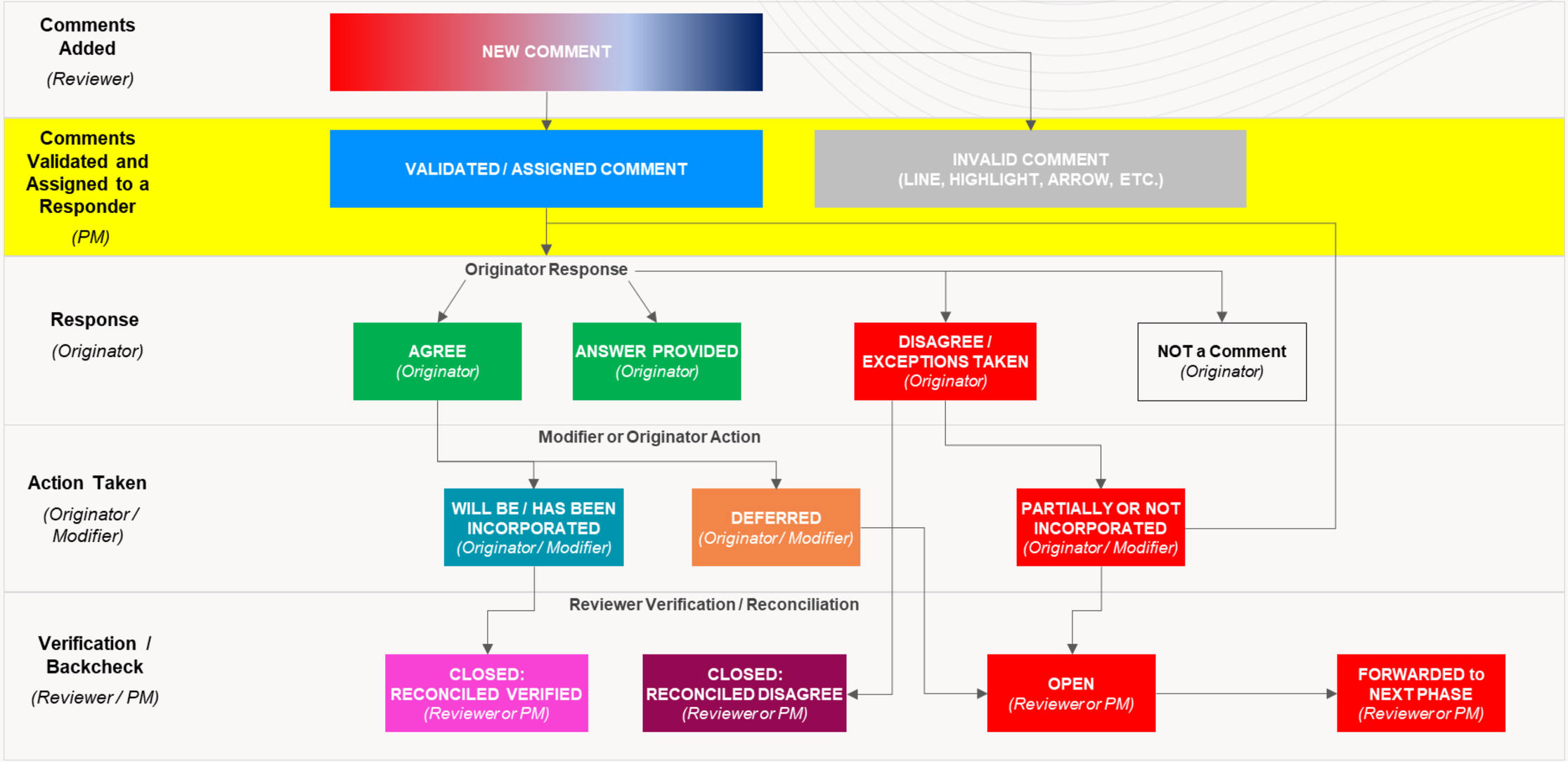

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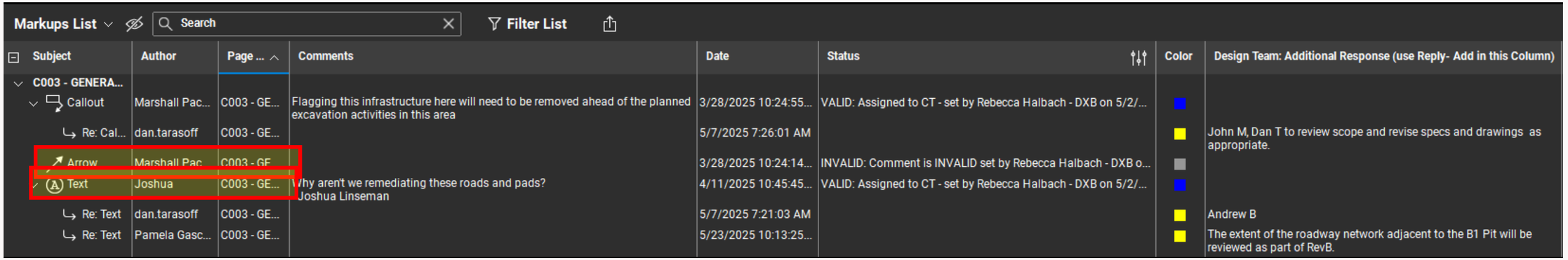

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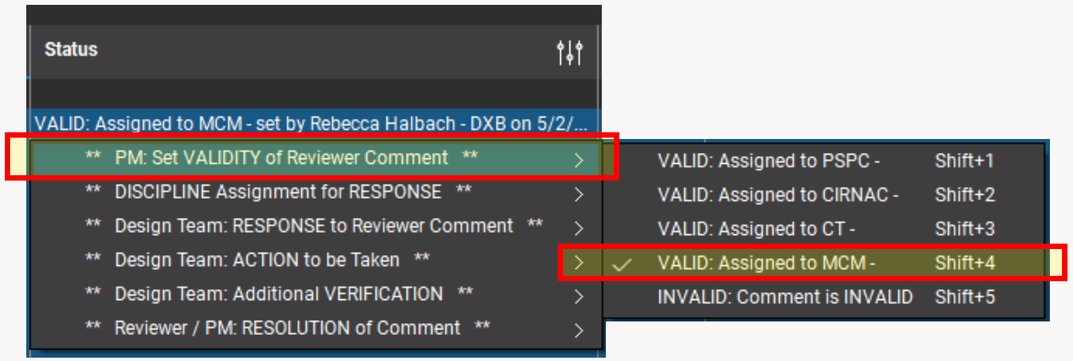

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Callout	Marshall Pac...	C003 - GE...	Flagging this infrastructure here will need to be removed ahead of the planned excavation activities in this area	3/28/2025 10:24:55...	VALID: Assigned to CT - set by Rebecca Halbach - DXB on 5/2/...		
Re: Cal...	dan.tarasoff	C003 - GE...		5/7/2025 7:26:01 AM			John M, Dan T to review scope and revise specs and drawings as appropriate.
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Text	Joshua	C003 - GE...	Why aren't we remediating these roads and pads? - Joshua Linseman	4/11/2025 10:45:45...	VALID: Assigned to CT - set by Rebecca Halbach - DXB on 5/2/...		
Re: Text	dan.tarasoff	C003 - GE...		5/7/2025 7:21:03 AM			Andrew B
Re: Text	Pamela Gasc...	C003 - GE...		5/23/2025 10:13:25...			The extent of the roadway network adjacent to the B1 Pit will be reviewed as part of RevB.

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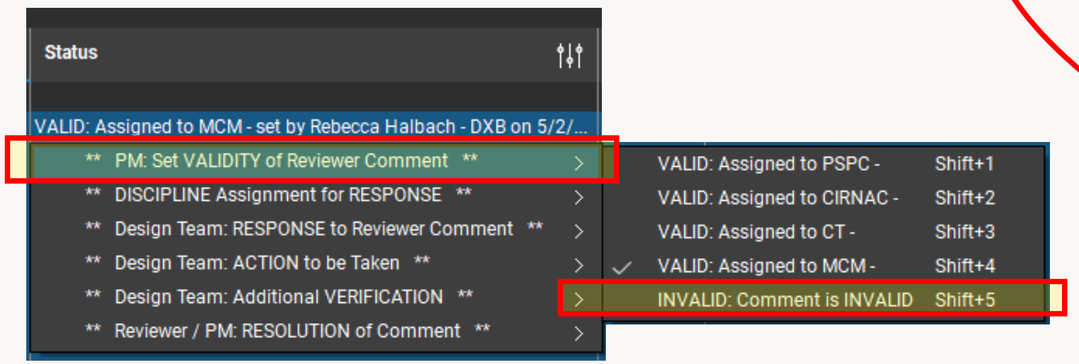
UNBOUND

Bluebeam Review / Reconciliation Process

Statuses in Action:

Reviewer Comment



Markups List | Search | Filter List

Subject	Author	Page ...	Comments	Date	Status	Color	Design Team: Additional Response (use Reply- Add in this Column)
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Bluebeam Review / Reconciliation Process

Statuses in Action:

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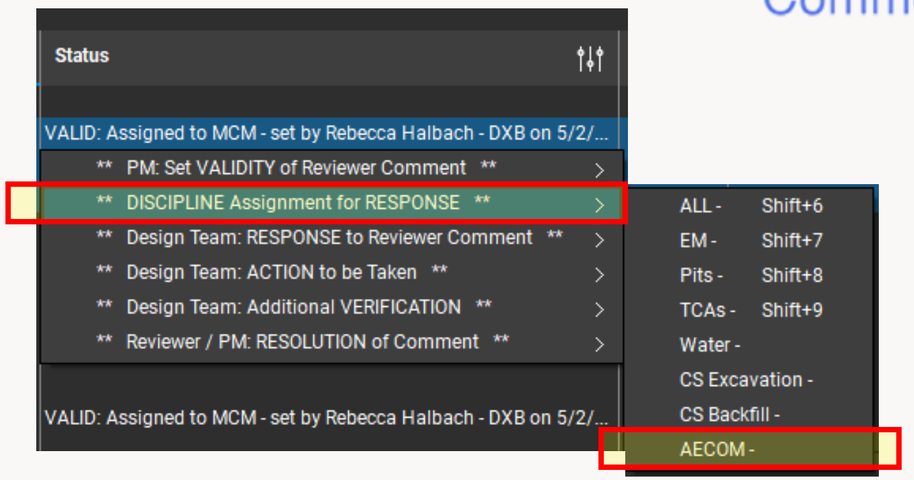

Markups List | Search | Filter List

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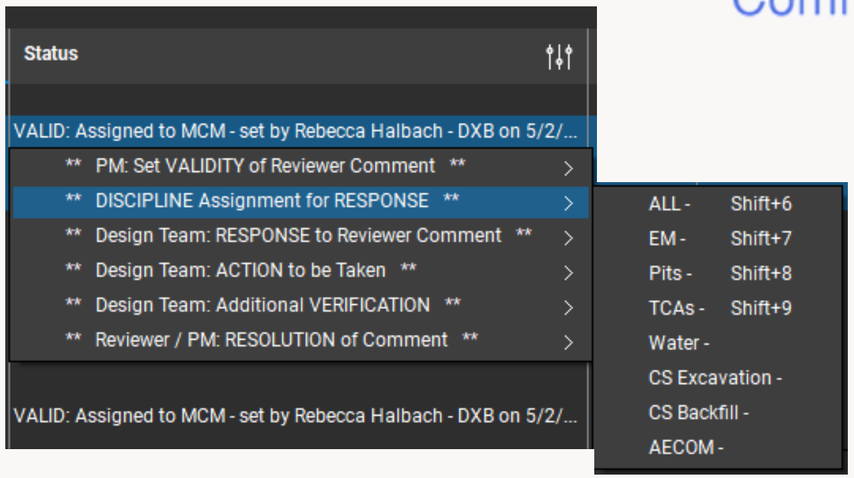
Bluebeam Review / Reconciliation Process

Statuses in Action:

Reviewer Comment



Markups List | Search | Filter List

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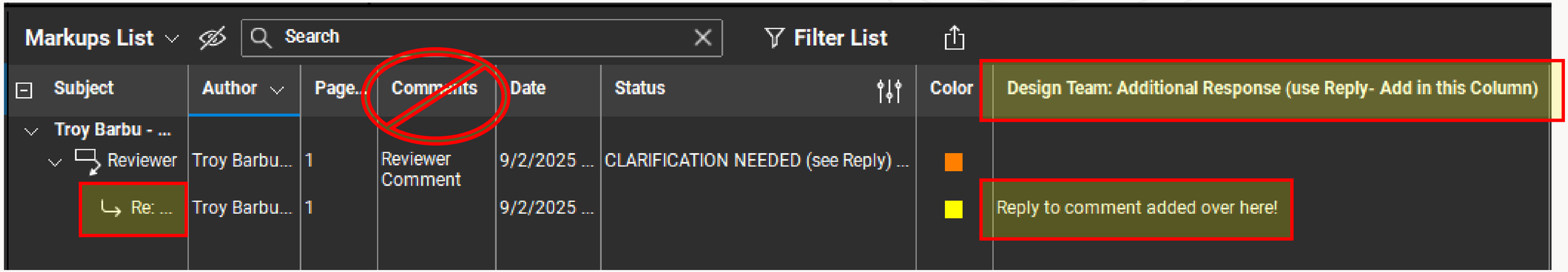
Bluebeam Review / Reconciliation Process

Statuses in Action:



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Large-Agency & Permitting Agency “Pain-Points”

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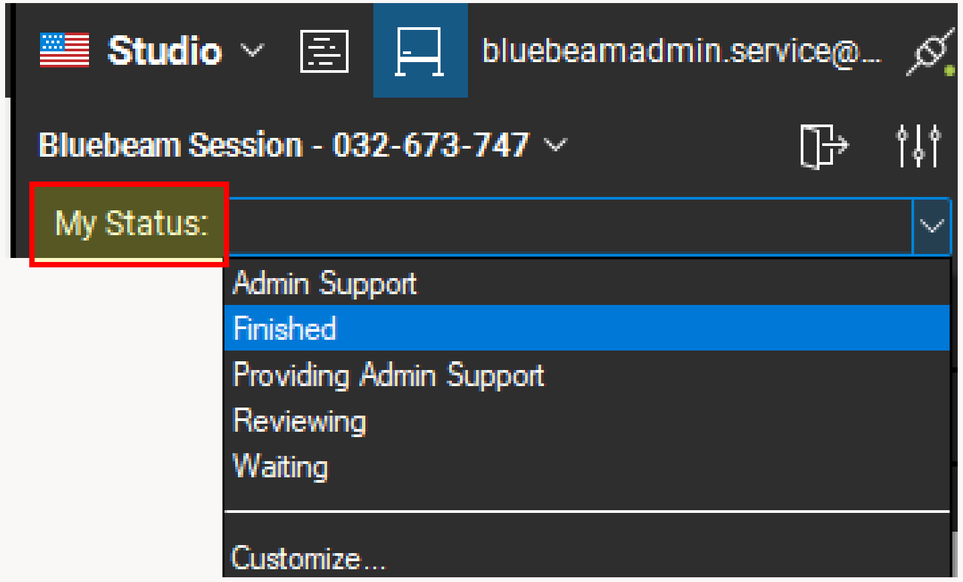
Reviewer to Admin/PM Collaboration - Completion

Completion of Review: **Option 1: “My Status” in Bluebeam**



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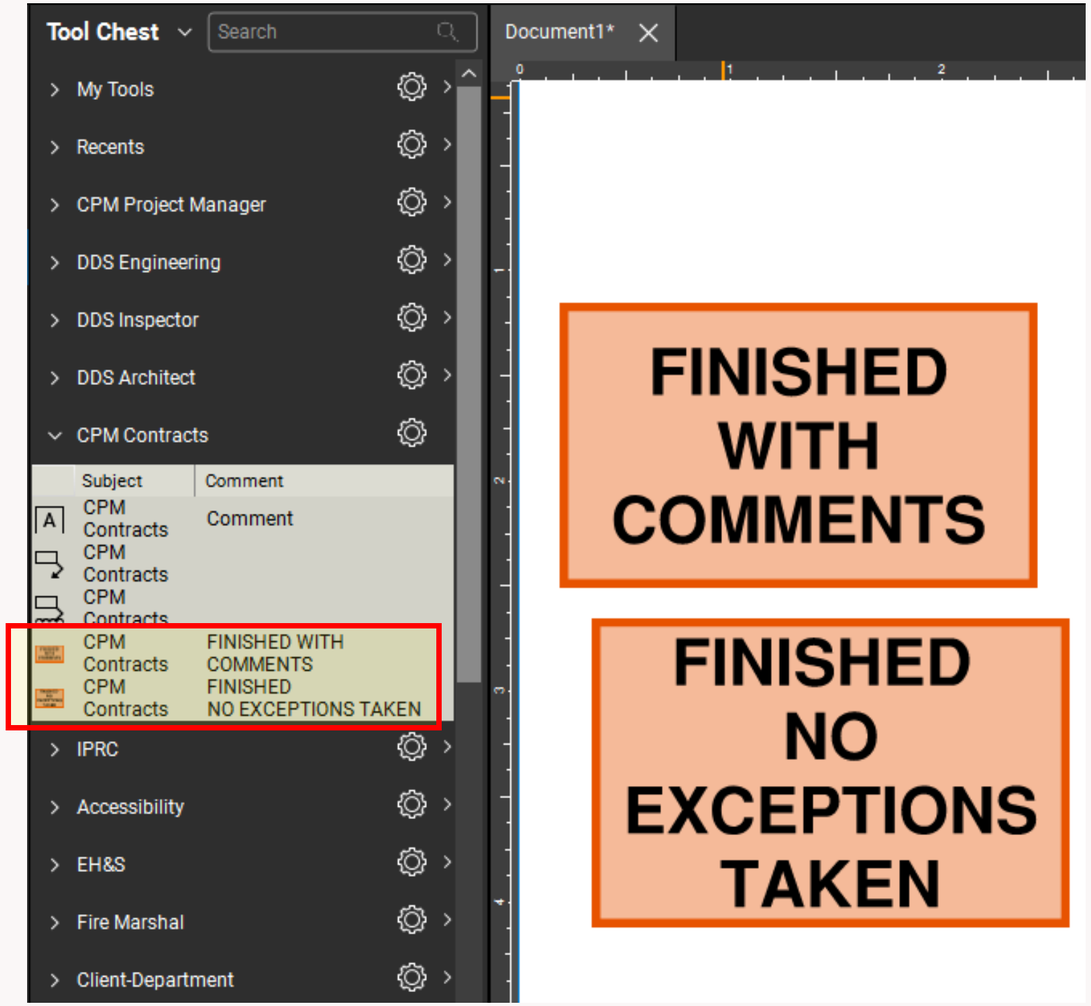
Reviewer to Admin/PM Collaboration

Completion of Review: **Option 2: “Fancy Text Box” Tool**



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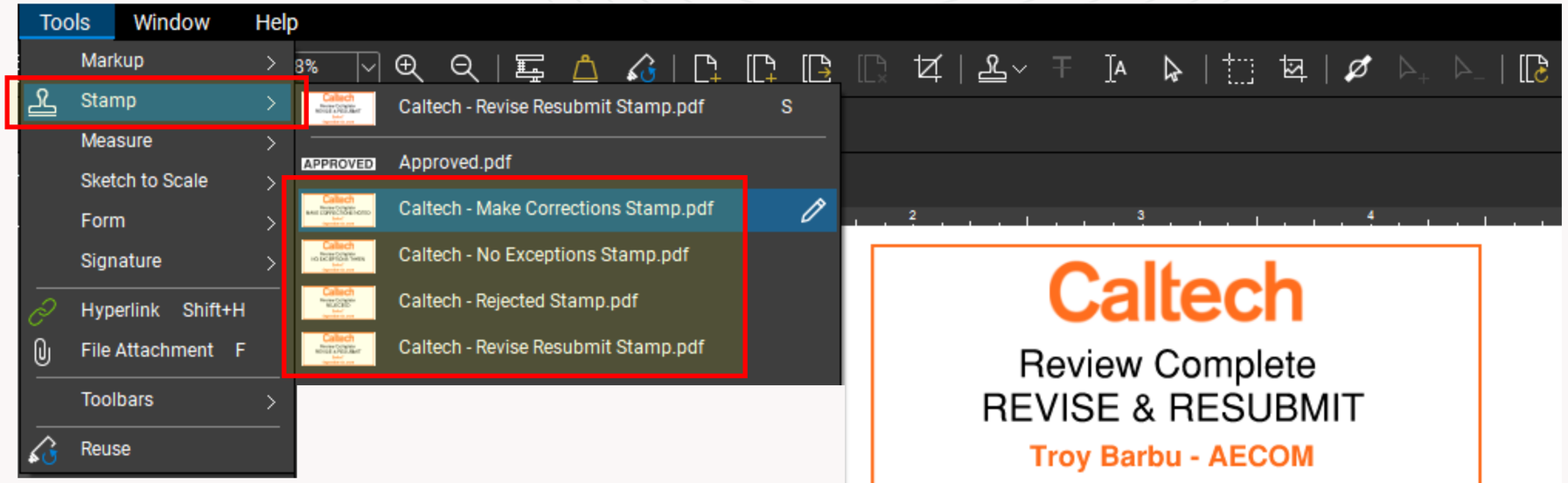
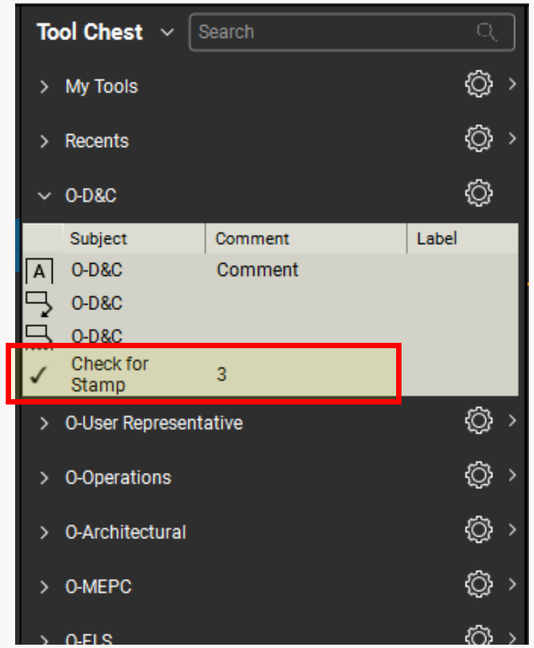
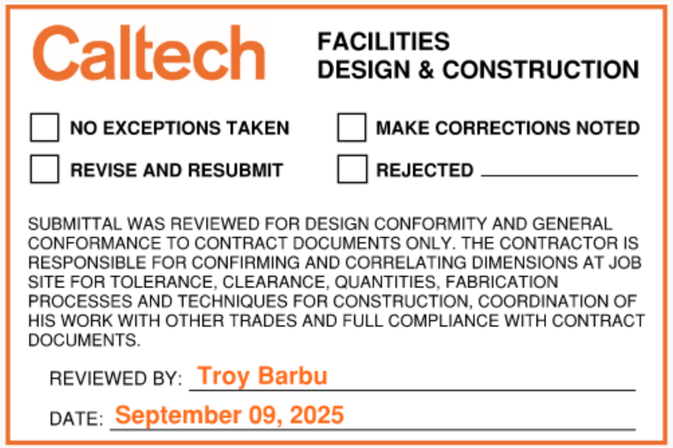
Reviewer to Admin/PM Collaboration

Completion of Review: **Option 3: “Bluebeam Stamp” using Dynamic Data**







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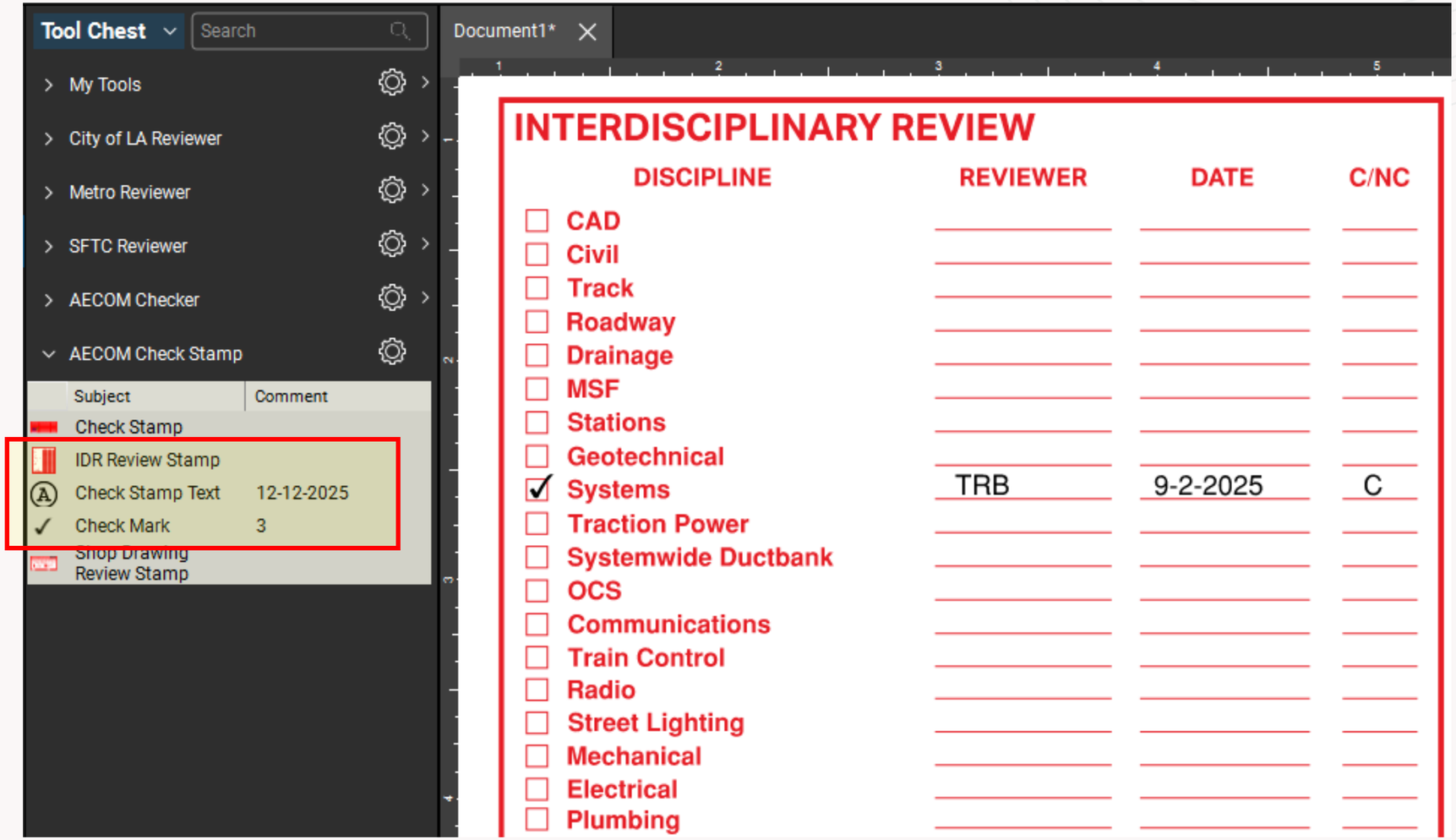
Reviewer to Admin/PM Collaboration

Completion of Review: **Option 4a: “Form-Like” or “Document-Like” Fancy Text Box (Signed)**



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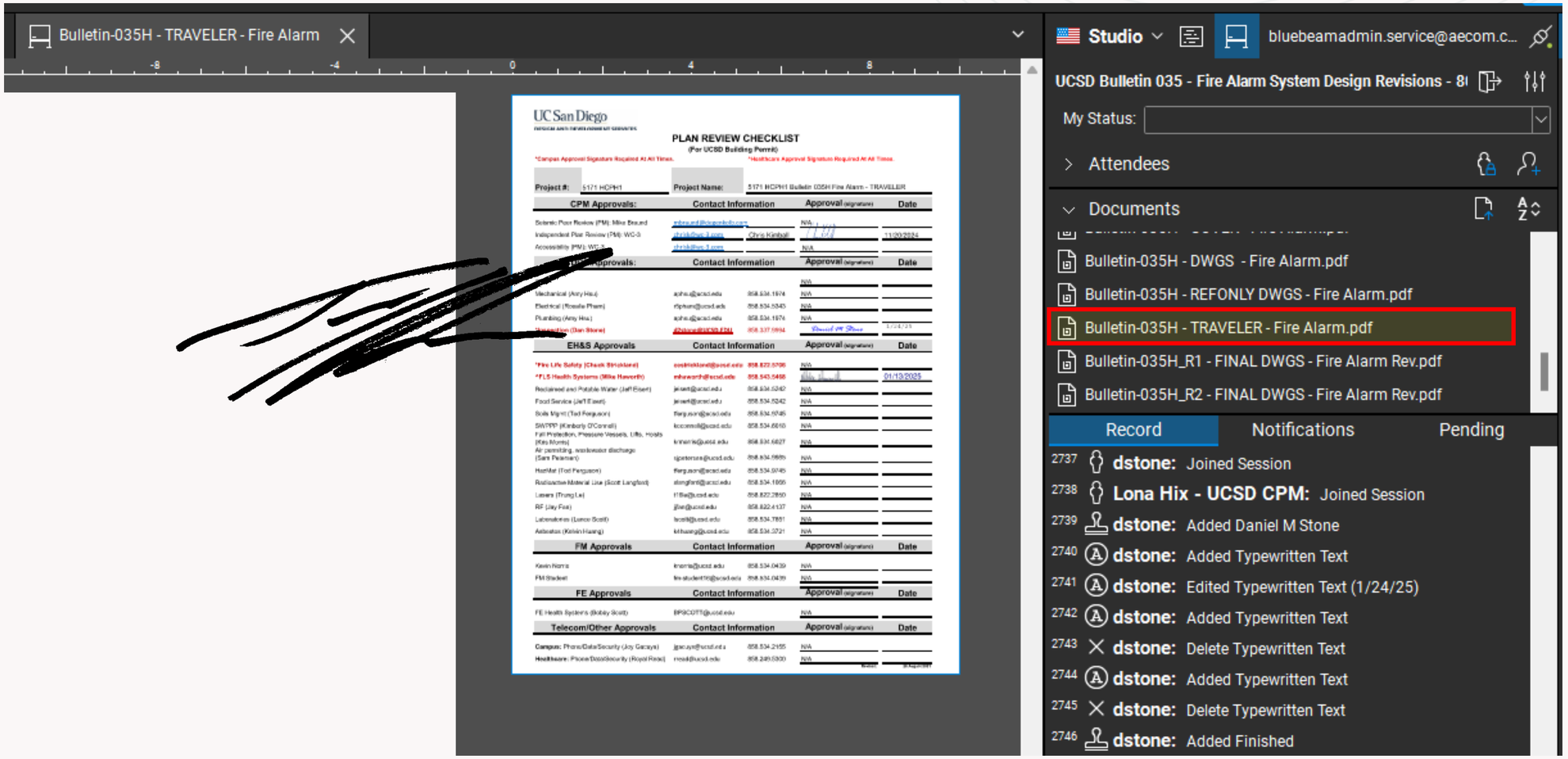
UNBOUND

Reviewer to Admin/PM Collaboration

Completion of Review: **Option 4b: Separate Form in the Session (Signed)**



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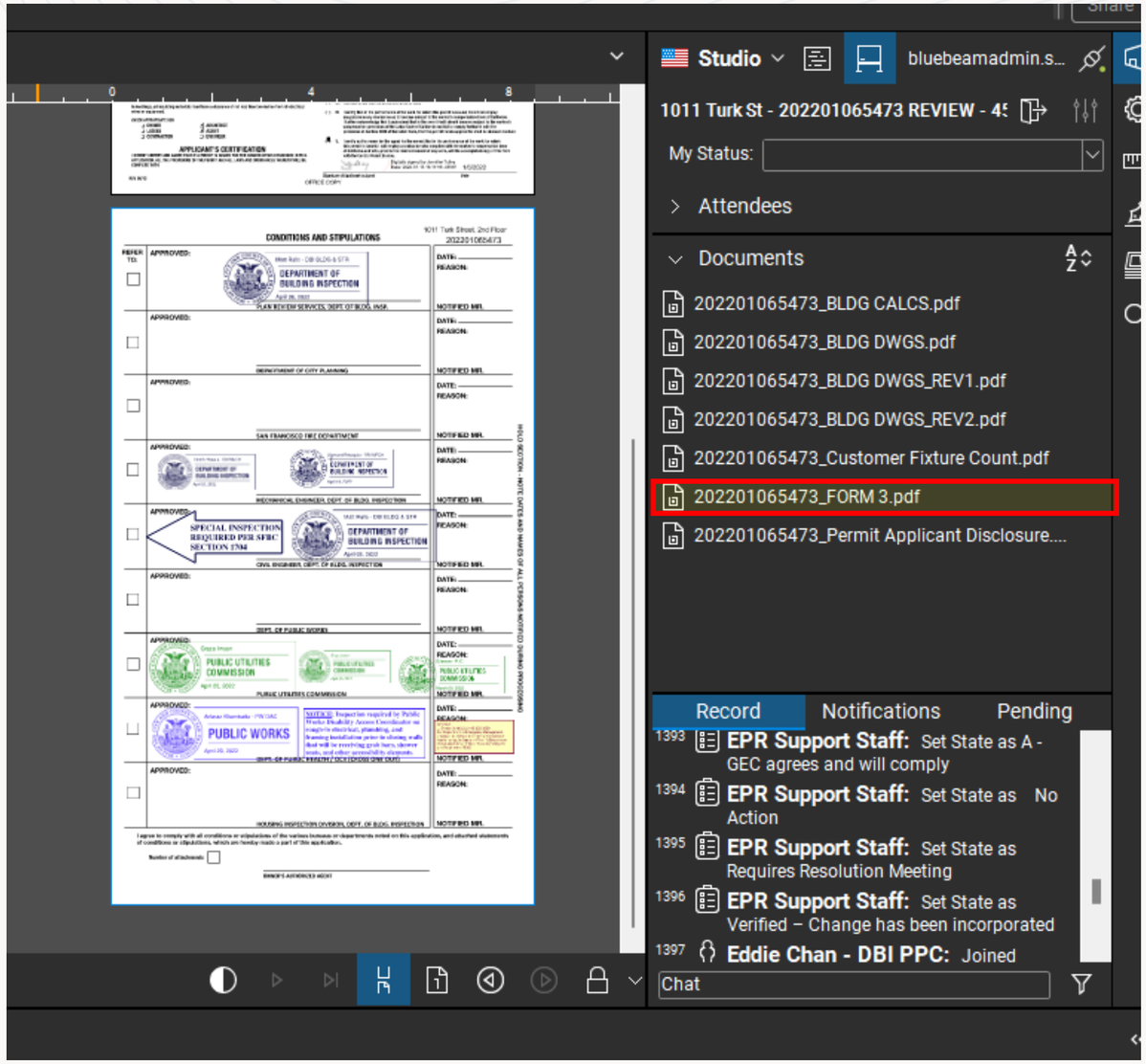
Reviewer to Admin/PM Collaboration

Completion of Review: **Option 4c:** **Separate Form in the Session (Stamped)**

Troy Barbu

DEPARTMENT OF BUILDING INSPECTION

September 09, 2025



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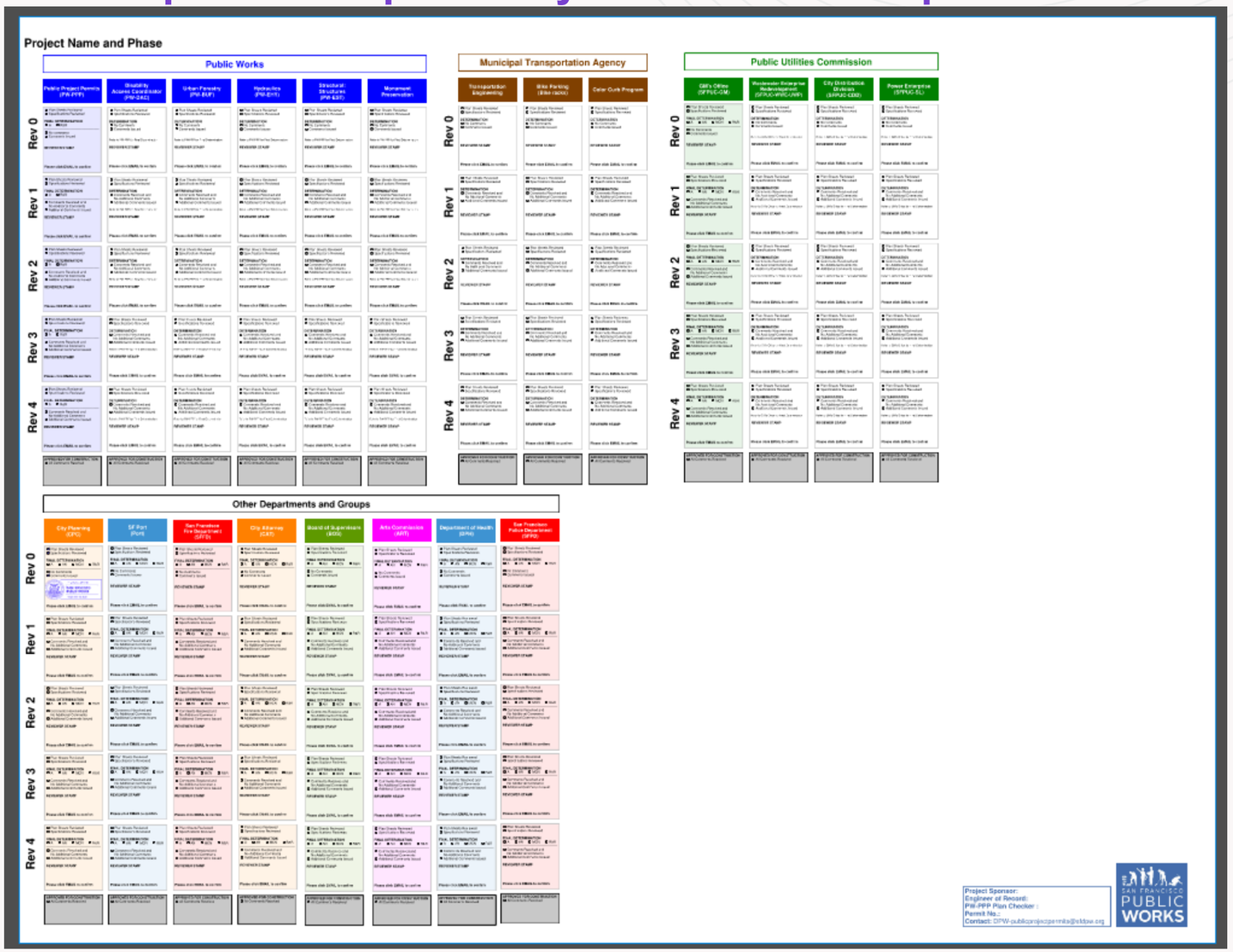
Reviewer to Admin/PM Collaboration

Completion of Review: **Option 5: Separate Hybrid Form / Stamp Document with Hyperlinks**



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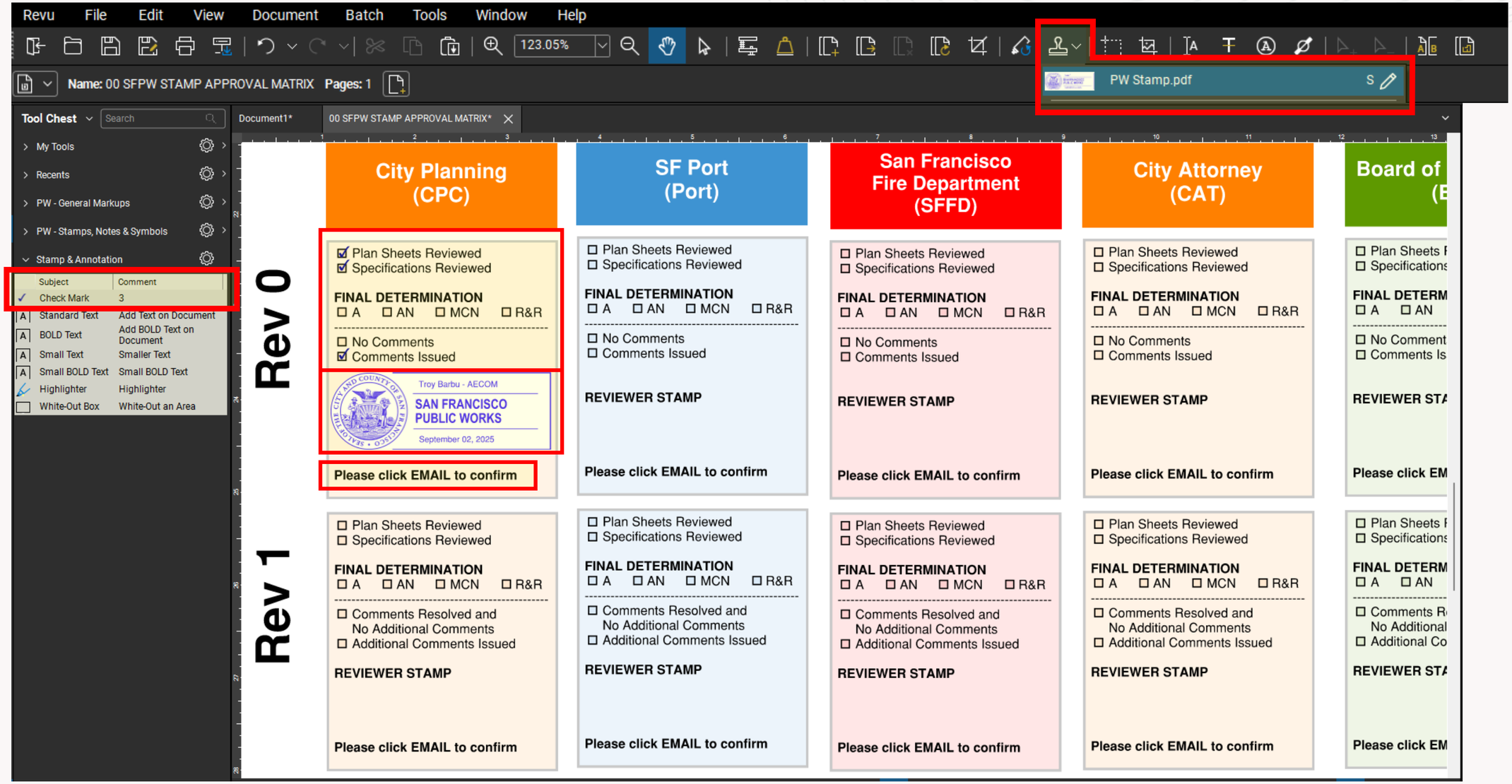
Reviewer to Admin/PM Collaboration



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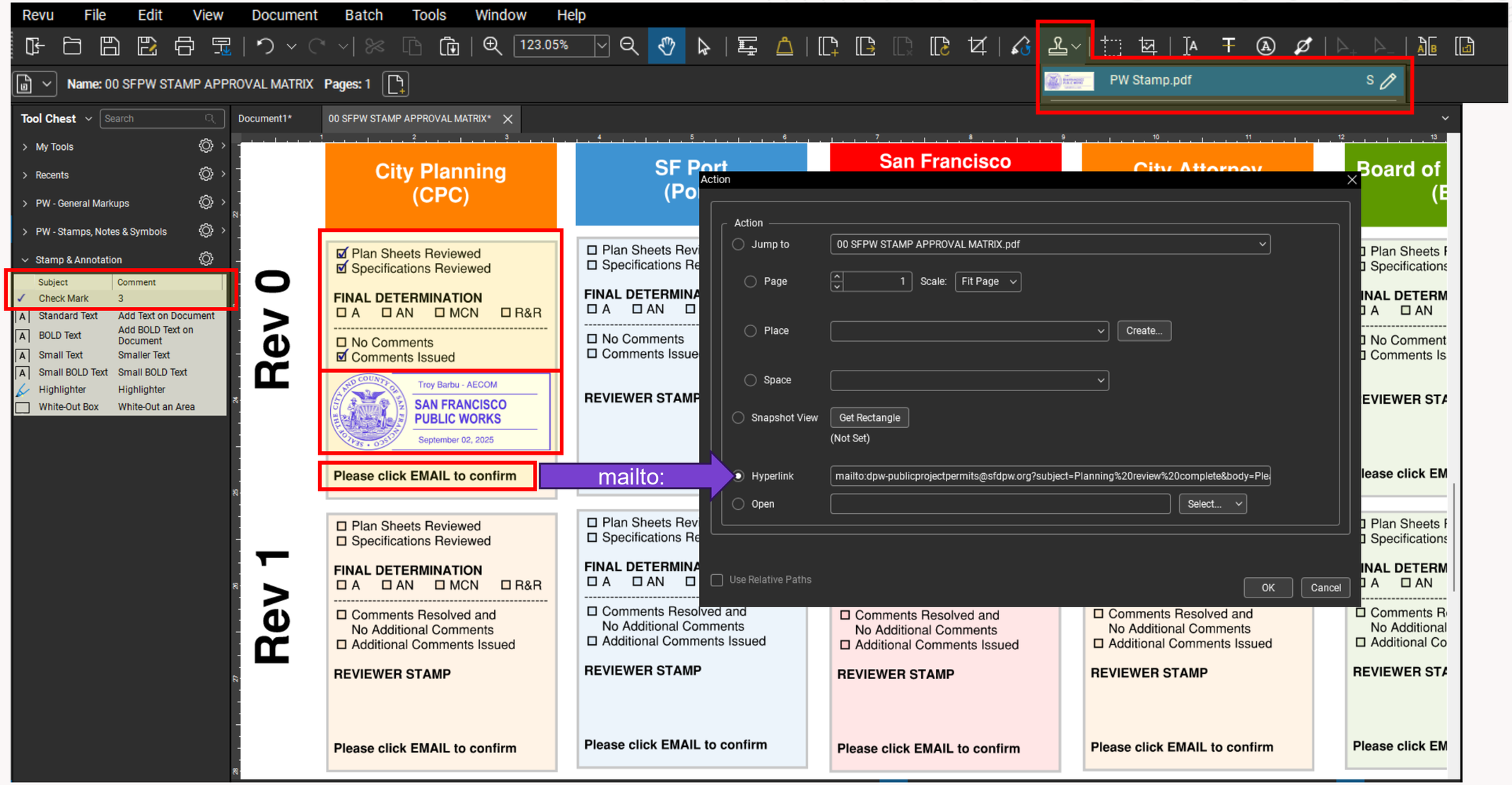
Reviewer to Admin/PM Collaboration



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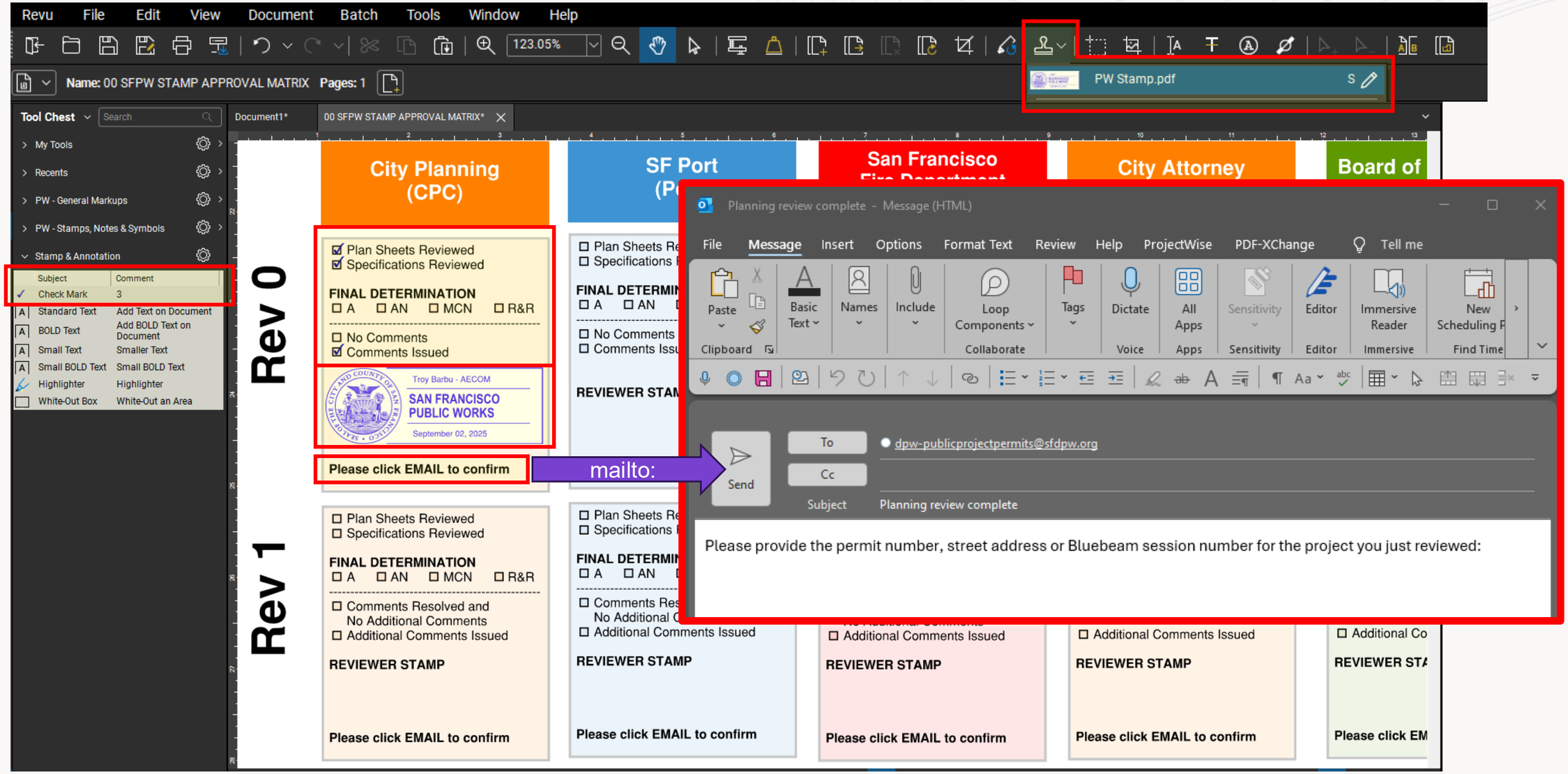
Reviewer to Admin/PM Collaboration



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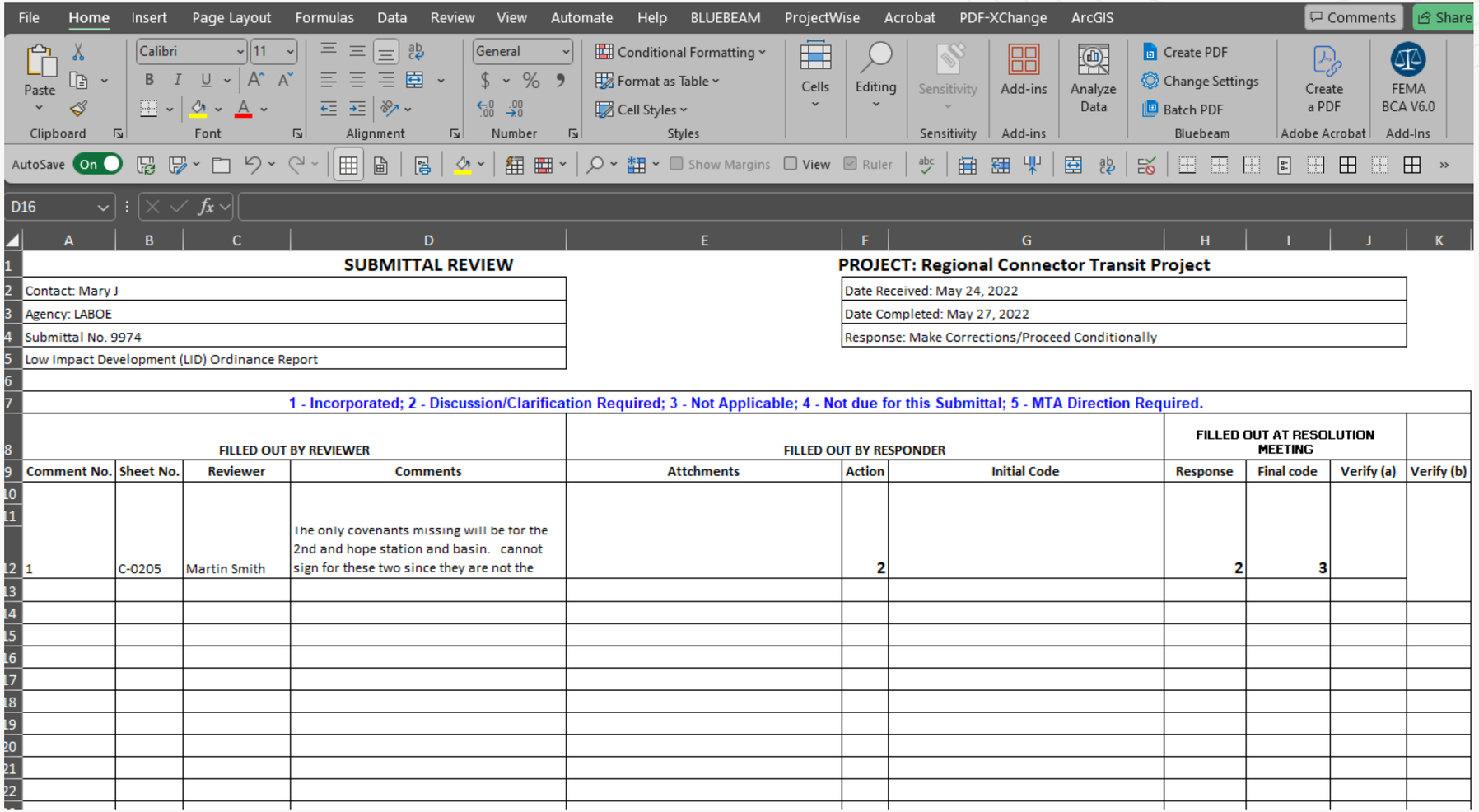
Bluebeam Review Comment Exporting

The Long-Established Legacy Process



SUBMITTAL REVIEW

Contact: Mary J
Agency: LABOE
Submittal No. 9974
Low Impact Development (LID) Ordinance Report

PROJECT: Regional Connector Transit Project

Date Received: May 24, 2022
Date Completed: May 27, 2022
Response: Make Corrections/Proceed Conditionally

1 - Incorporated; 2 - Discussion/Clarification Required; 3 - Not Applicable; 4 - Not due for this Submittal; 5 - MTA Direction Required.

FILLED OUT BY REVIEWER				FILLED OUT BY RESPONDER			FILLED OUT AT RESOLUTION MEETING			
Comment No.	Sheet No.	Reviewer	Comments	Attchments	Action	Initial Code	Response	Final code	Verify (a)	Verify (b)
1	C-0205	Martin Smith	The only covenants missing will be for the 2nd and hope station and basin. cannot sign for these two since they are not the		2		2	3		

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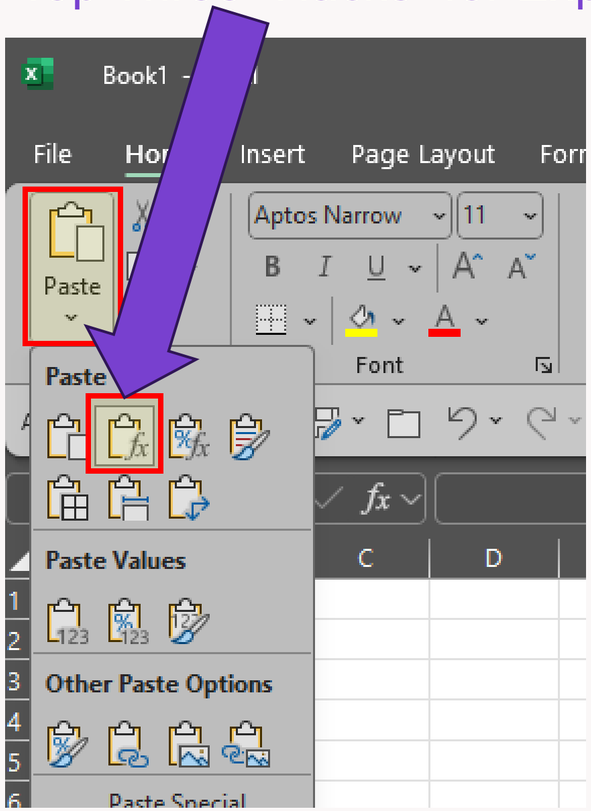
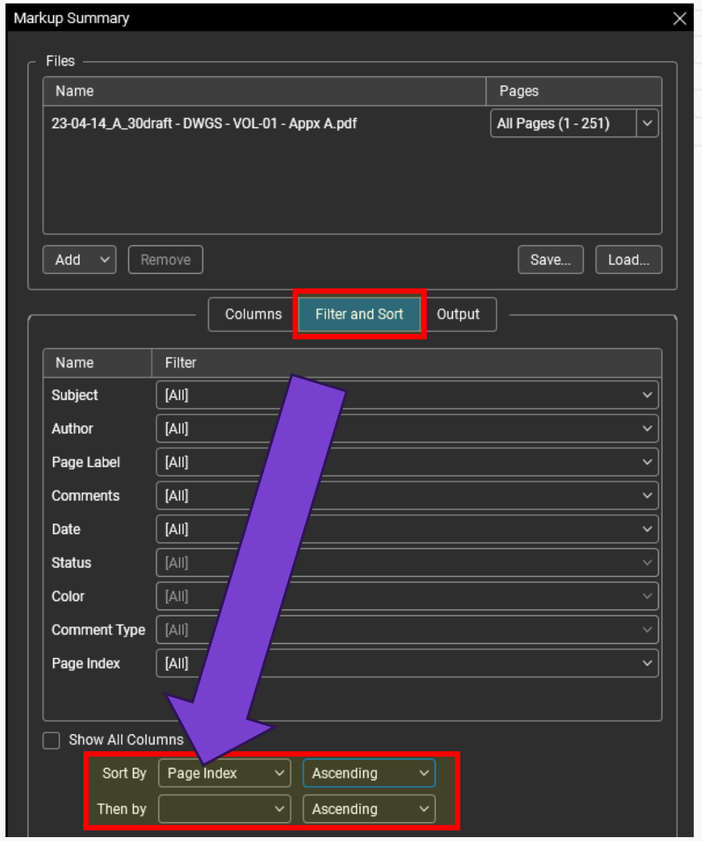
Bluebeam Review Exporting

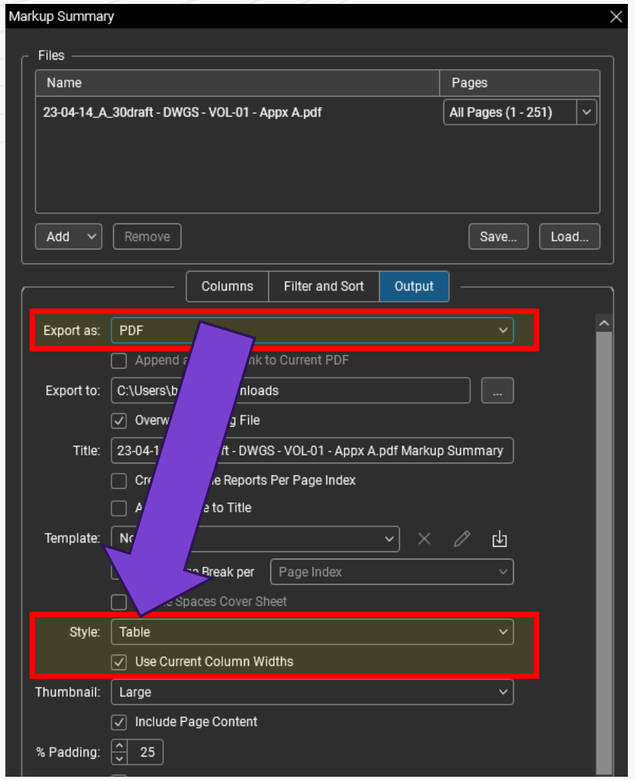
Top Three “Hacks” for Exporting Comments:



1. In Excel, Paste from the CSV into the Excel Template using the “**Formulas**” paste option



2. When Exporting Drawing Pages, Sort by **Page Index** First



3. For PDF Exports, use the **Table Style & Current Column Widths** Options

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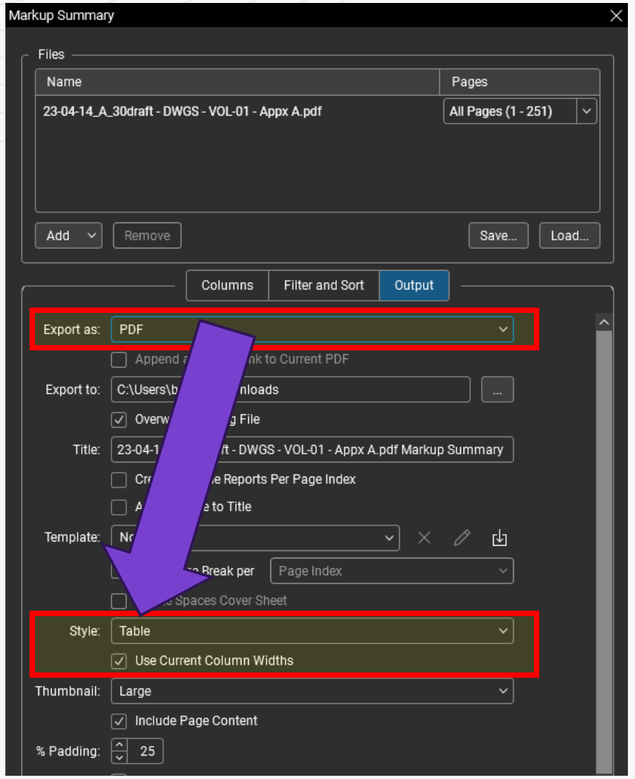
Bluebeam Review Exporting

Example for Applicant Response Worksheet:



3. For PDF Exports, use the **Table Style & Current Column Widths** Options

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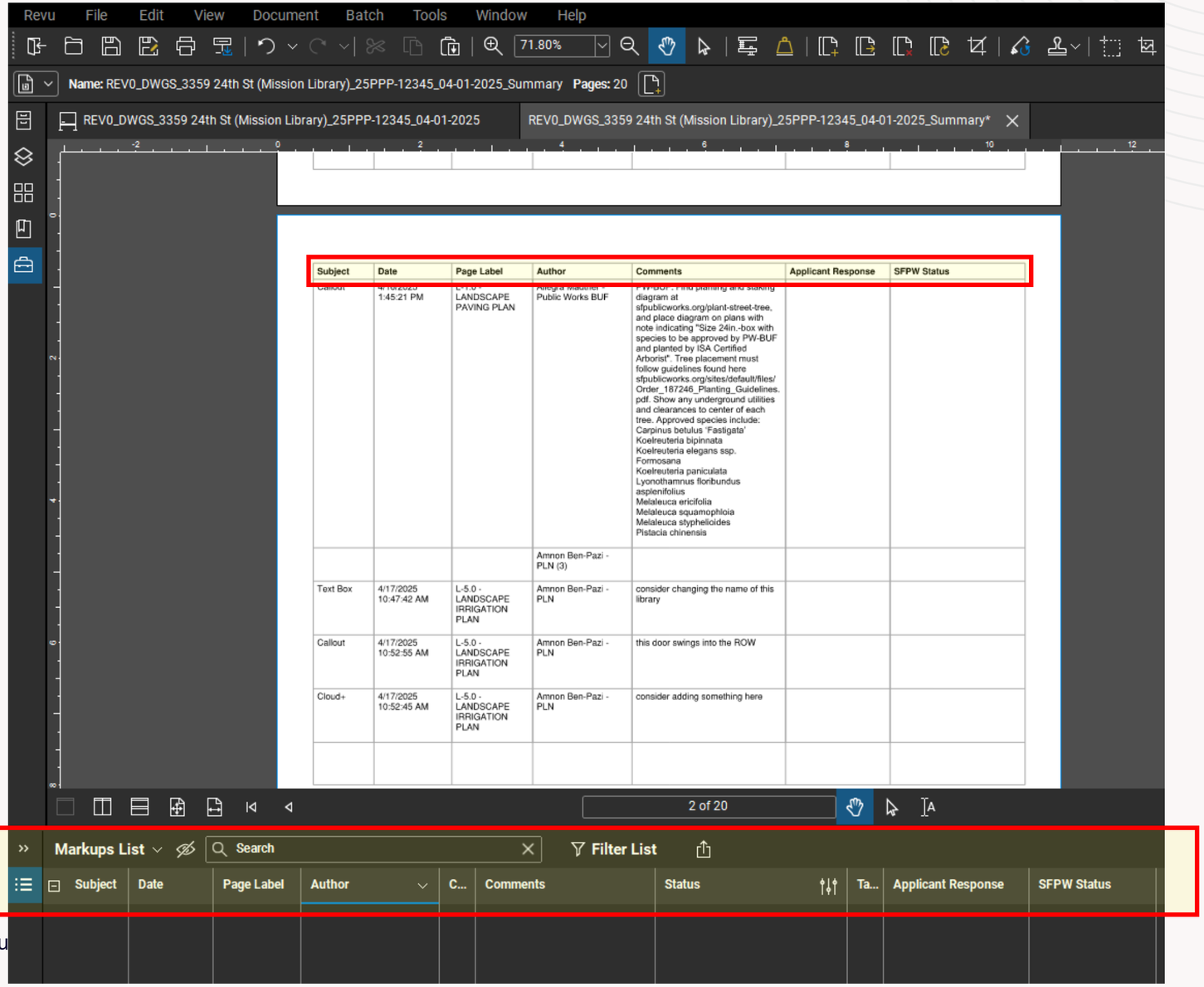
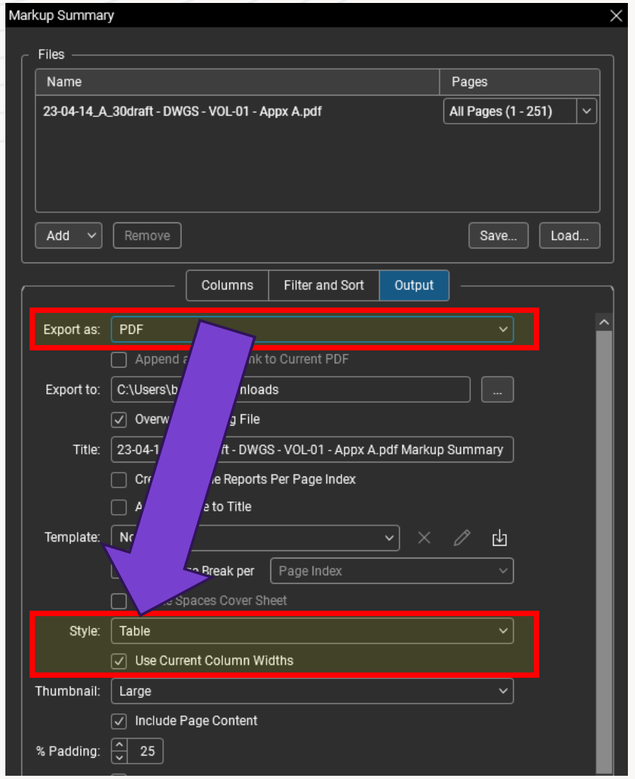
Bluebeam Review Exporting





3. For PDF Exports, use the **Table Style & Current Column Widths** Options

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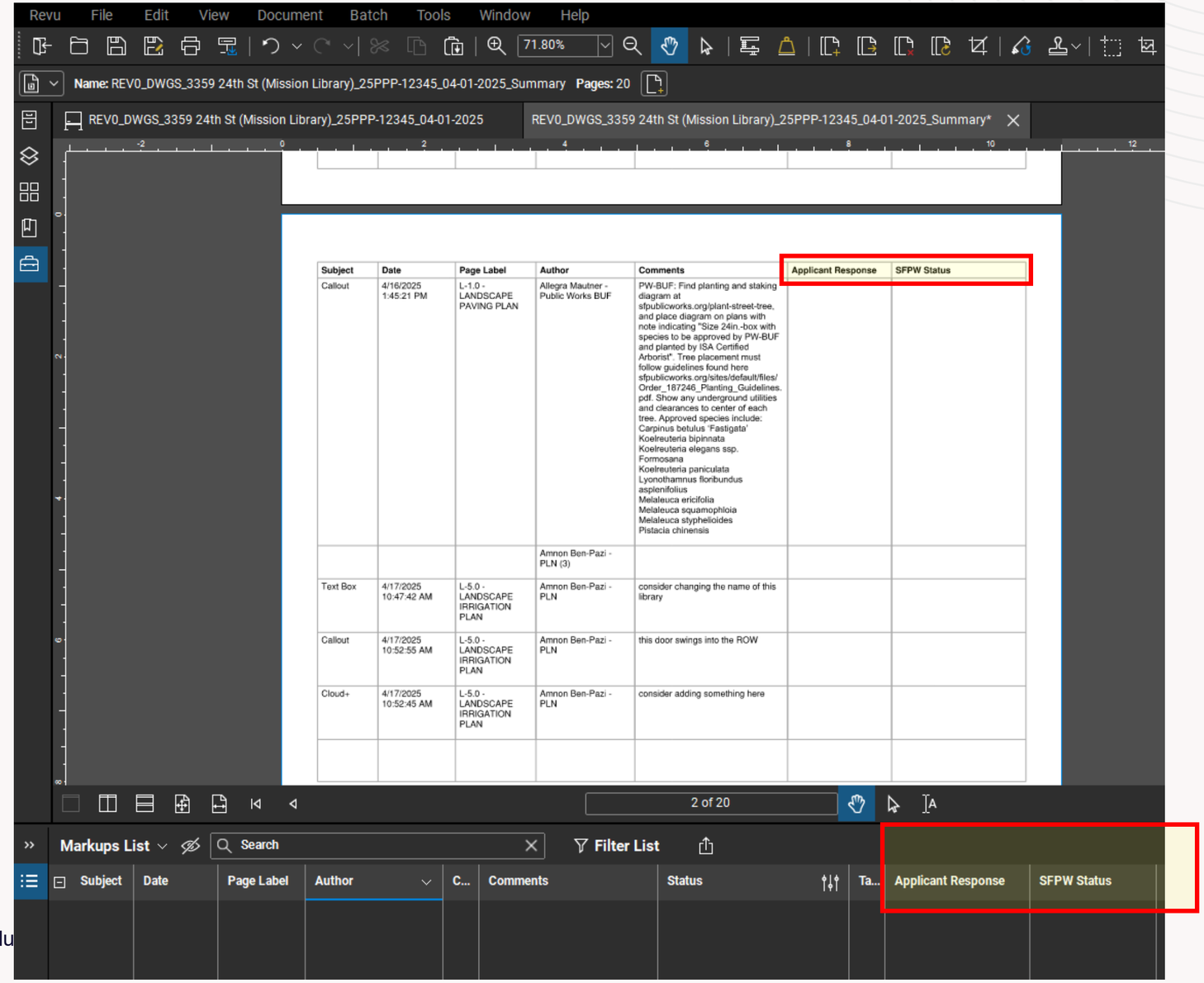
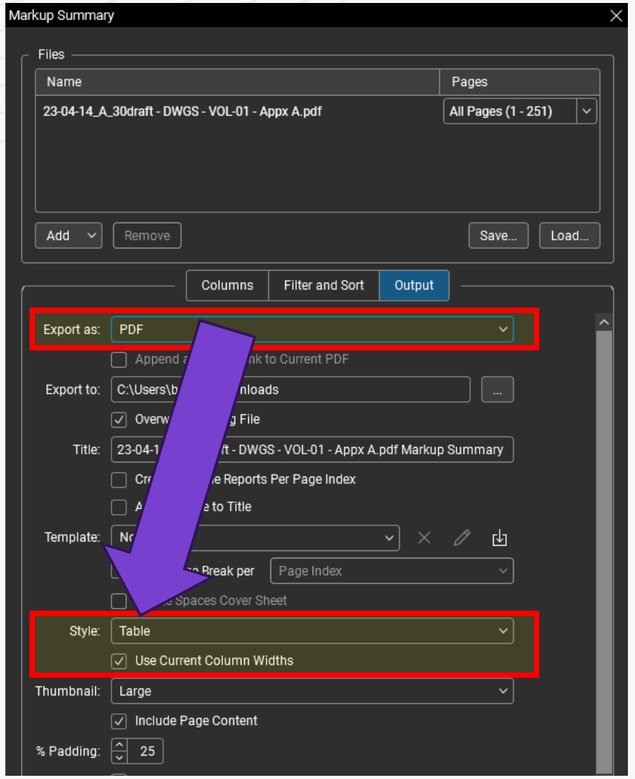
Bluebeam Review Exporting





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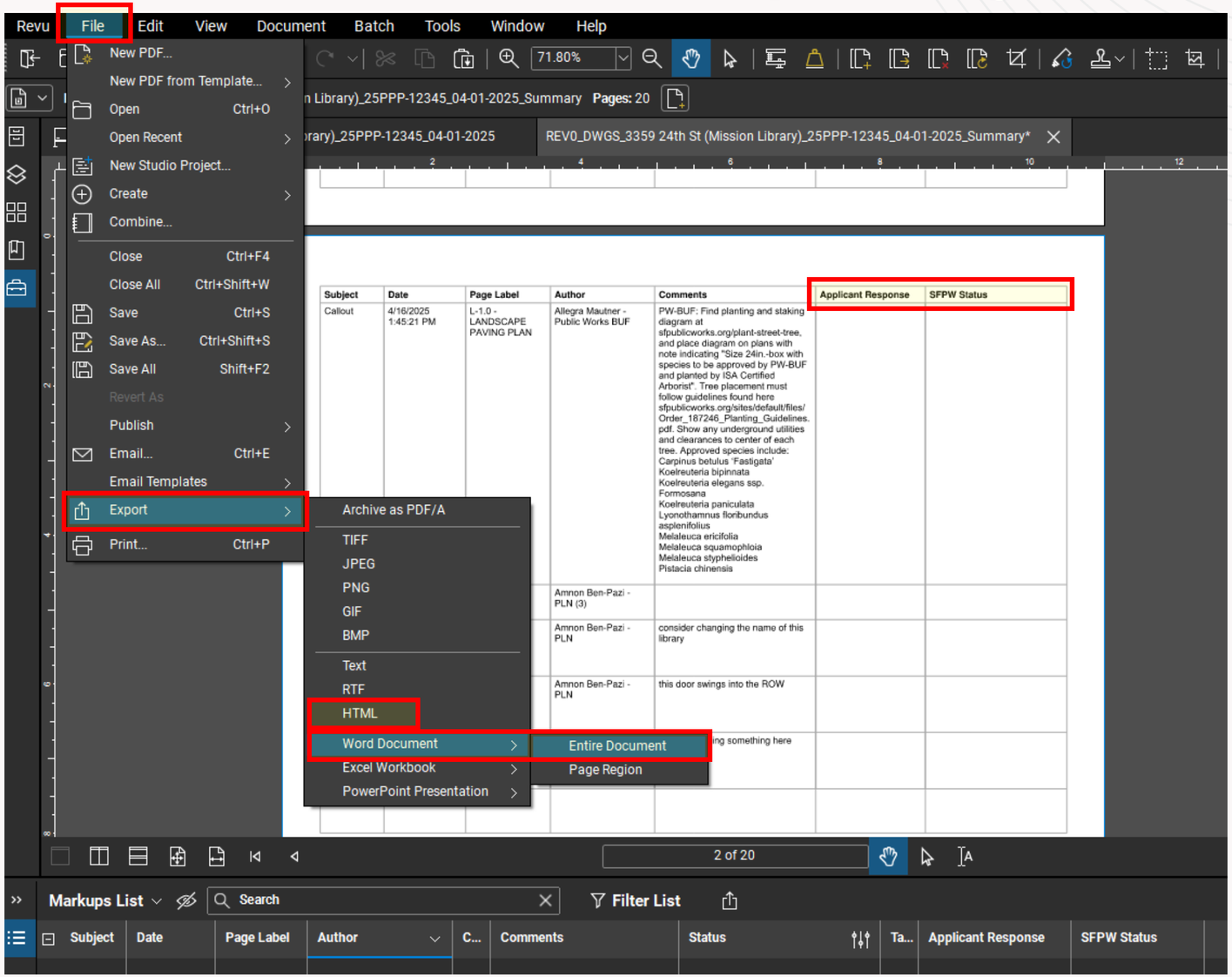
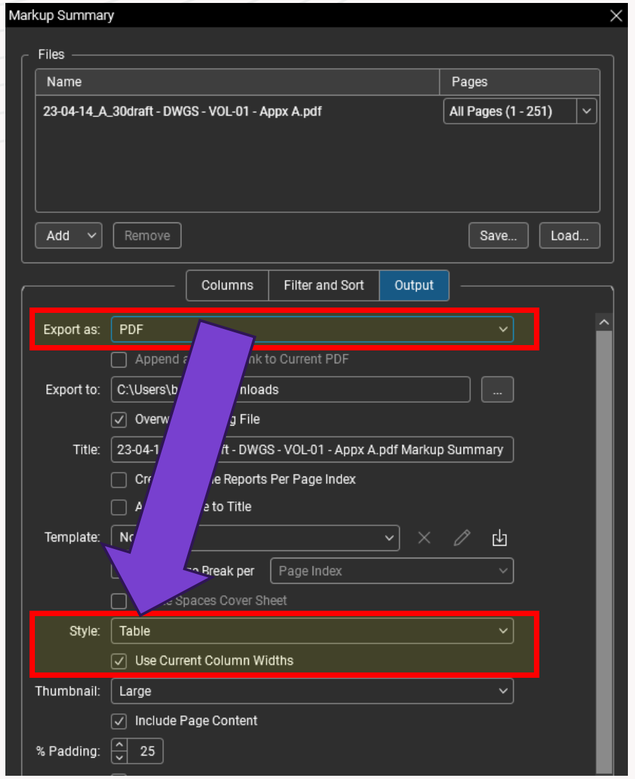
Bluebeam Review Exporting





3. For PDF Exports, use the **Table Style & Current Column Widths** Options

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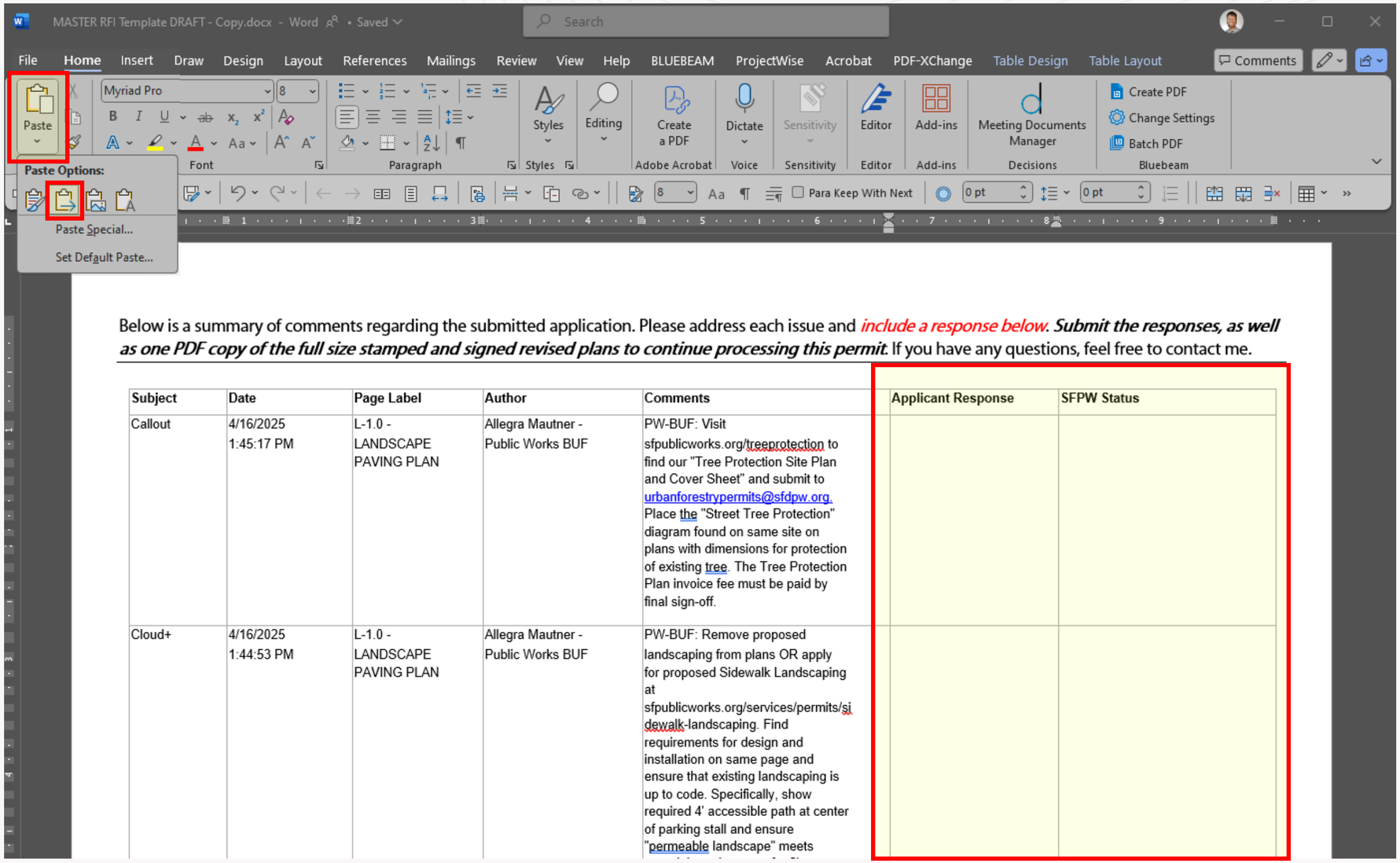
Bluebeam Review Exporting

Applicant Response:



Below is a summary of comments regarding the submitted application. Please address each issue and *include a response below*. ***Submit the responses, as well as one PDF copy of the full size stamped and signed revised plans to continue processing this permit.*** If you have any questions, feel free to contact me.

Subject	Date	Page Label	Author	Comments	Applicant Response	SFPW Status
Callout	4/16/2025 1:45:17 PM	L-1.0 - LANDSCAPE PAVING PLAN	Allegra Mautner - Public Works BUF	PW-BUF: Visit sfpublicworks.org/treeprotection to find our "Tree Protection Site Plan and Cover Sheet" and submit to urbanforestrypermits@sfdpw.org. Place the "Street Tree Protection" diagram found on same site on plans with dimensions for protection of existing tree. The Tree Protection Plan invoice fee must be paid by final sign-off.		
Cloud+	4/16/2025 1:44:53 PM	L-1.0 - LANDSCAPE PAVING PLAN	Allegra Mautner - Public Works BUF	PW-BUF: Remove proposed landscaping from plans OR apply for proposed Sidewalk Landscaping at sfpublicworks.org/services/permits/sidewalk-landscaping. Find requirements for design and installation on same page and ensure that existing landscaping is up to code. Specifically, show required 4' accessible path at center of parking stall and ensure "permeable landscape" meets		

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Top 10 Things you are doing WRONG in Bluebeam!

Not in any order…

Overarching Setup (Before you get started)

1. **Not planning for the administration-side** of Sessions & Projects
2. **Not creating/customizing a Profile** - at least custom statuses, and a custom toolbar (vs. using markups from the pulldown)
3. **Not Prescribing consistent Drawing Title Blocks** (location, page numbering, etc.) as well as overall PDF Formatting (Bookmarks, Page Labels, etc.)

Creating the Documents

4. **Not creating Bookmarks / Page Labels** in drawings and Not creating Bookmarks in Documents

Setting up the Documents for Review

5. **Not Creating ONE Bluebeam Session for ALL Phases** (i.e. Creating Single Sessions at each phase)
6. **Not linking** Sessions to Projects
7. **Not using Status Menus** in Markups for Communication and Back Check

Reviewing the Documents

8. **Using Red** as your markup color
9. **Not using MyTools** Toolbox (for keyboard shortcuts)
10. **Not using Markups List Filters** (with Statuses, Colors, Exports etc.)

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Thank You!

Troy Barbu
Global Program Management
Digital Lead

AECOM

troy.barbu@aecom.com

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