



PMWeb Bluebeam® Integration

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Introduction

The objective of the PMWeb Bluebeam integration is to allow users to select one or more PDF files in Document Manager or an Attachments tab and launch a Bluebeam review session. Markups and comments from the Bluebeam session are sent to PMWeb. Marked-up PDFs are saved back to PMWeb when the Bluebeam session is closed.

This document covers [Configuring the PMWeb Bluebeam Integration](#) as well as [Using the PMWeb Bluebeam Integration](#).

Using the PMWeb Bluebeam Integration

Unlike most PMWeb records, Bluebeam Markups records can only be created using the steps described in the next section of this document – they cannot be created directly from the Bluebeam Markups page.

Creating a Bluebeam Session from PMWeb

Important note: To create a session you must have Bluebeam Revu installed on your machine.

To create a new Bluebeam session from PMWeb:

1. Select one or more *eligible* PDF files in either a Document Manager folder or an Attachments tab. To be eligible a file must
 - a. Be the correct format of PDF
 - b. Not already be in a Bluebeam session
 - c. Not be checked out
 - d. Not be in Workflow
 - e. Not have a Status of “Approved”, “Rejected”, or “Withdrawn”
2. Click the Bluebeam button in the toolbar. The Bluebeam Gateway dialog opens.

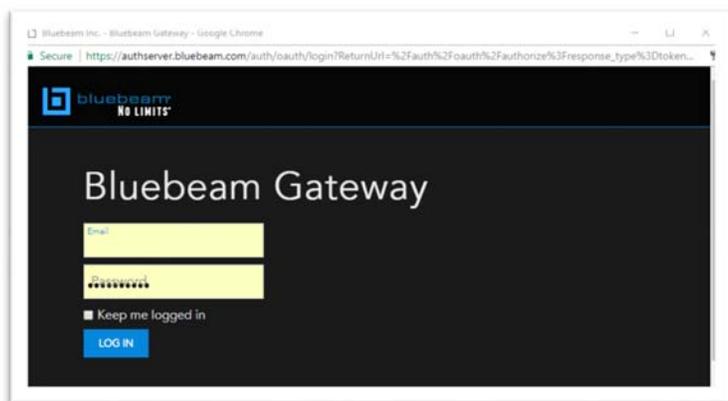


Figure 1 - The Bluebeam Gateway Dialog

Important note: The Bluebeam button will not be enabled unless all selected files are eligible for a Bluebeam session. See step 1, above.

3. Enter your Bluebeam credentials and then click the Log In button. The Grant Access dialog opens.

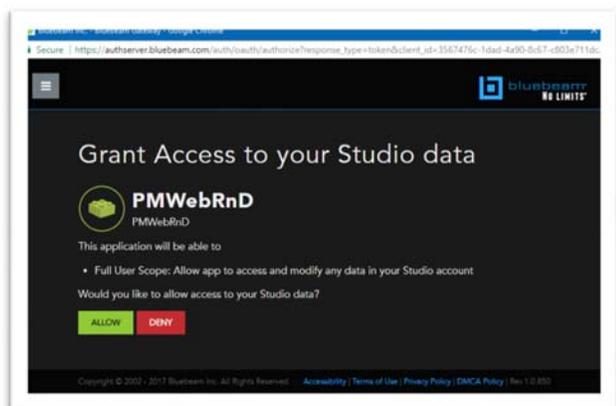


Figure 2 - The Grant Access Dialog

4. Click the Allow button. The Select Companies/Contacts dialog opens.

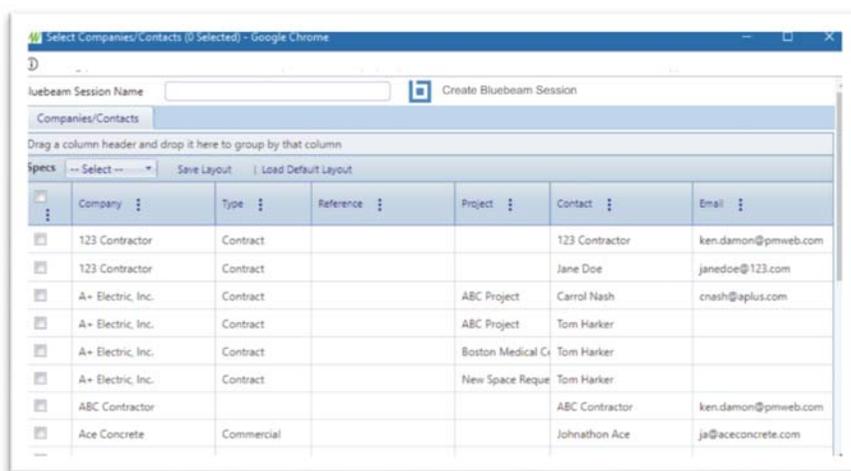


Figure 3 - The Companies/Contacts Dialog

- a. Type a name for the session in the Bluebeam Session Name field
- b. Select one or more lines in the PMWeb Companies/Contacts table to act as session participants. (This is optional – participants can also be invited inside the Bluebeam session but they will not necessarily be PMWeb contacts.)
- c. Click the Create Bluebeam Session button in the dialog header. Bluebeam Revu opens in a new session with the selected PDFs.

Using the PMWeb Bluebeam Markups Record

When a Bluebeam session is created from PMWeb a Bluebeam Markups record is automatically created at the same time. Bluebeam Markups records perform several functions:

- Use the Details tab to view some or all of the session markups. Use the View Actions filter, View Types filter, and table layout tools to tailor your view.
- Download the latest markups. To download the latest markups:
 1. Connect to Bluebeam. See [Connecting to Bluebeam](#), below.
 2. Click the Update Markups button in the header toolbar
- View and manage the PDFs linked to the session from the [PDF Files Tab](#).

Connecting to Bluebeam

In order to download the latest markups, end a session, or navigate to a session from PMWeb you must first connect to Bluebeam. To connect to a Bluebeam session from PMWeb follow these steps:

1. Open a Bluebeam Markups record
2. Click the Connect to Bluebeam button in the header toolbar. The Bluebeam Gateway dialog opens.
3. Enter your Bluebeam credentials and then click the Log In button. The Grant Access dialog opens.
4. Click the Allow button. The Grant Access dialog closes and returns you to the Bluebeam Markups record. You are now connected to Bluebeam. In the header toolbar the Open Session and End Session buttons may now be enabled (if the Bluebeam Session has not already been ended) and the Connect to Bluebeam button label will be changed to “Update Markups”.

Three Bluebeam-specific buttons appear in the Bluebeam Markups record toolbar after you connect to Bluebeam:

- **Update Markups** – Click this button to download the latest markups from the Bluebeam session to the Details tab.
- **Open Session** – Click this button to open Bluebeam Revu or Vu on your device and load the Bluebeam session.
- **End Session** – Click this button to end the session in Bluebeam, update the final markups in the Details tab, and release the PMWeb PDFs. (See [Ending a Bluebeam Session from PMWeb](#), below.)



Figure 4 - The Bluebeam Markups Record Toolbar with Three Bluebeam Buttons

PDF Files Tab

This tab displays a list of all of the PDFs in a Bluebeam session. All fields in the table are read only except the Inactive toggle button.



Figure 5 - The Active/Inactive Toggle Button

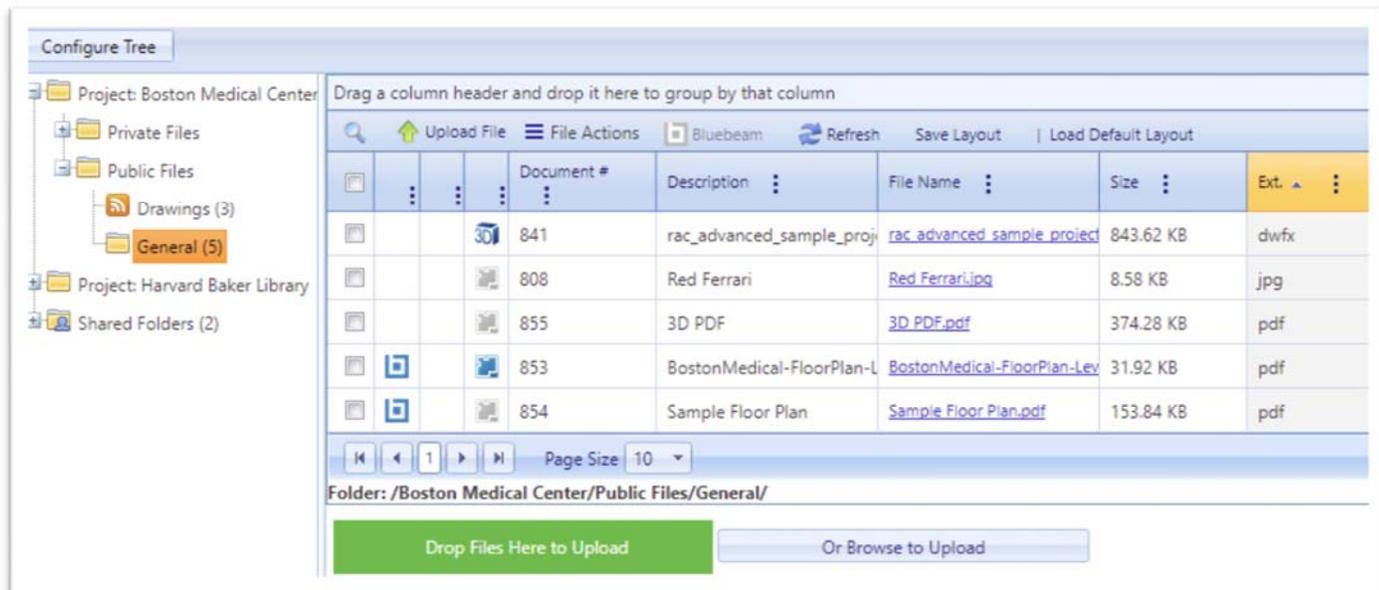
Click this toggle button to make the PMWeb PDF active or inactive within the Bluebeam session. This button is not available for PDFs that were directly added to the session from within Bluebeam. When you make a PMWeb PDF inactive using this button:

- New markups to that PDF are not downloaded whenever the update markup function occurs.
- The PDF is released and made available to be used to create a new Bluebeam session

During the Bluebeam Session

When PMWeb PDFs are active in a Bluebeam session:

- A Bluebeam icon button appears for them in the Document Manager folder or Attachments tab table. Click this button to navigate to the PMWeb Bluebeam Markups record.
- The PDF is ineligible to be added to a different Bluebeam session.



Ending a Bluebeam Session from PMWeb

To end a Bluebeam session from PMWeb:

1. Open a PMWeb Markups record.
2. Connect to Bluebeam. (See [Connecting to Bluebeam](#), above.)
3. Click the End Session button. The End Bluebeam Session Confirmation dialog opens:

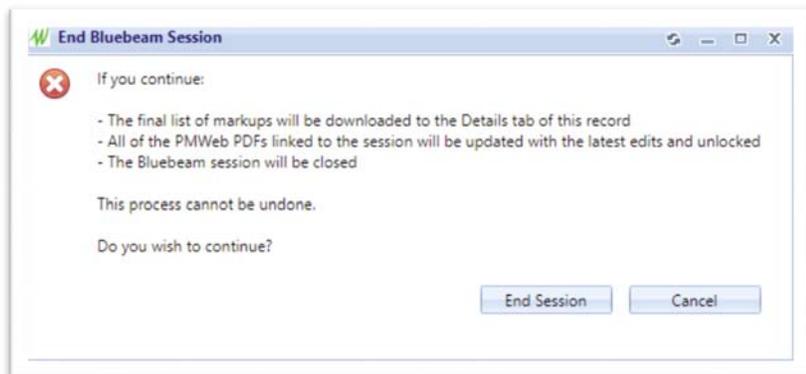


Figure 6 - The End Bluebeam Session Confirmation Dialog

Click the End Session button. The dialog closes and:

- The latest markups are downloaded to the Details tab.
- The marked up PMWeb PDFs are saved and unlocked.
- The Bluebeam session is closed.

Configuring the PMWeb Bluebeam Integration

Before using the PMWeb Bluebeam Integration you must create a Bluebeam developer account and generate a Bluebeam user key and secret key. These keys are then entered in the PMWeb Admin module, allowing your installation of PMWeb to use the Bluebeam Application Program Interface (API).

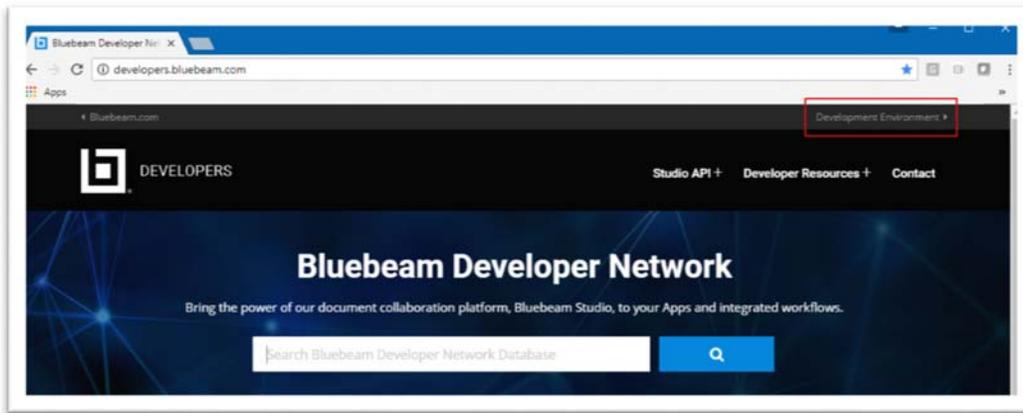


Figure 7 - The Development Environment Link

To generate Bluebeam keys:

1. Navigate to www.developers.bluebeam.com
2. Click the “Development Environment” link
3. Create a user account or log in with a previously created one
4. Click the “Add New” button

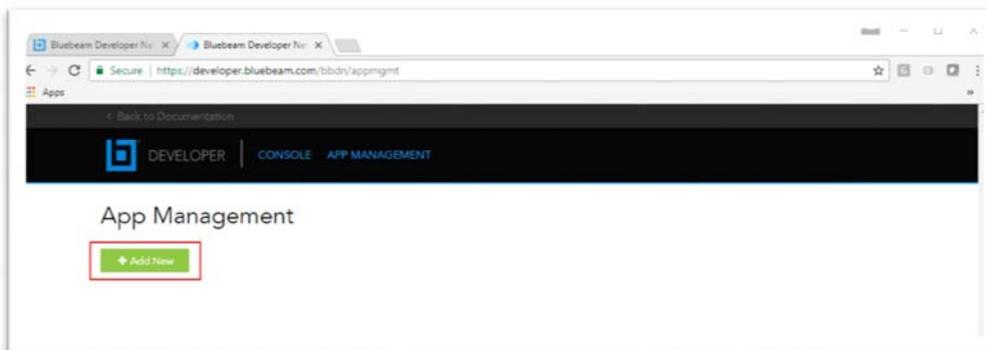


Figure 8 - Click the Add New Button

5. Complete ALL fields in the Add New Application page, as in the figure below.

Figure 9 - Complete ALL Fields

6. Click the “Submit” button. The application now appears as a card on the App Management page:

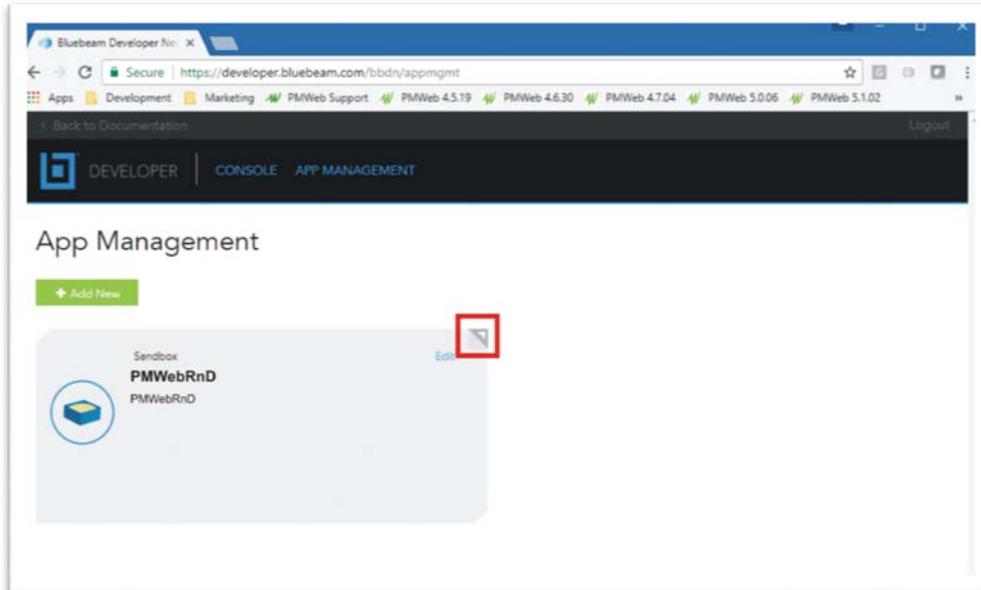


Figure 10 - Click the Page Button

7. In the upper right of the card click the Page button
8. Click the “Generate Secret” link
9. Copy the Client Key to the clipboard
10. Open the PMWeb Admin to the General Settings page
11. Paste the Client Key into the “Bluebeam Client Key” field in the PMWeb Admin
12. Return to the Bluebeam developer page
13. Copy the Secret Key to the clipboard
14. Return to the PMWeb Admin page
15. Paste the Secret Key into the “Bluebeam Secret Key” field in the PMWeb Admin
16. Click the “Save” button in the PMWeb Admin
17. Click the “Restart PMWeb” button in the PMWeb Admin

The PMWeb Bluebeam integration is now ready to use. The “Bluebeam” buttons in the PMWeb Document Manager and Attachments tabs will now be active when one or more eligible PDFs is selected. See [How the PMWeb Bluebeam Integration Works](#), above, for more information.

Notes

Here are a few important notes about the PMWeb Bluebeam Integration:

- The integration is designed to be used with Bluebeam Revu 2016 and higher.
- To create a Bluebeam session from PMWeb Bluebeam Revu must be installed and licensed on the device running PMWeb.
- To use the “Connect to Bluebeam” features (see [Connecting to Bluebeam](#), above) Bluebeam Revu or Bluebeam Vu must be installed and licensed on the device running PMWeb.
- To simply view the markups in the Details tab of the Bluebeam Markups record Bluebeam Revu or Bluebeam Vu are not required.
- To create a Bluebeam Markups record the Bluebeam Session must be created from a PMWeb Document Manager folder or Attachments tab.