FIELD GUIDE

THE BLUEBEAM STARTER GUIDE

For construction & the trades

A no-fluff field guide to the parts of Bluebeam Revu you'll actually use every day.

By David Strom

Hey — before you start

If you're reading this, somebody handed you Bluebeam Revu and one of three things is true:

1. You're an estimator and your numbers live or die in this software.
2. You're a foreman, super, or PM and you mark up drawings every day.
3. You're "the office person" who got handed the license and told to *figure it out.*

Whichever one you are, this guide skips the marketing, skips the 200-page PDF that came with your subscription, and walks you through the eight things that matter most. Nothing else.

By the end you'll be able to set up a usable workspace, calibrate a drawing, take a real measurement, build your own tool set, slip-sheet a revision, and not lose your mind doing it.

A few notes before we dive in:

- **Version-agnostic, mostly.** Bluebeam keeps moving things around between versions. The screenshots in your software might not look exactly like what I describe — but the *workflow* is the same. If a menu name changed, look for something close.
- **You don't need every tool.** Bluebeam has hundreds of features. You'll use about twelve of them constantly. We're focused on those twelve.
- **Practice on a junk file.** Grab any old PDF and follow along. Don't learn this stuff on a live bid.

Alright. Let's go.

1. Set up your Profile (5 minutes that save you hours)

The first time you open Revu, the toolbars are a chaotic mess of icons you've never seen. Profiles fix that.

A **Profile** is a saved layout — toolbars, panels, tool sets — that you can switch between. Bluebeam ships with profiles for "Estimator," "Field," "Punch," and a few others. They're decent starting points.

To switch profiles:

1. Go to **Revu** → **Profiles** in the top menu (or click the profile icon in the top-right).
2. Pick one that matches what you do most.

3. Use it for a week. Steal what works.

To make your own:

1. Start from a profile that's close to what you want.
2. Drag toolbars where you want them. Right-click any toolbar to add or remove buttons.
3. Open the panels you actually use (Tool Chest, Markups List, Bookmarks). Close the rest.
4. Go to **Revu → Profiles → Manage Profiles → Save As**.
5. Name it something obvious. "Field — Dave" beats "Profile_v3_FINAL_v2."

> **Pro move:** make a profile for each role you play. I have one for estimating (heavy on measurement tools) and one for field markup (heavy on Tool Chest and the Markups List). Switching between them is one click.

2. Calibrate any drawing to scale

You can't measure anything in Bluebeam until the drawing knows what scale it's at. This trips up everyone the first time.

Most modern AEC PDFs come with embedded scale info. When they do, Bluebeam picks it up automatically. When they don't (older drawings, scanned plans, screenshots from a tablet), you calibrate manually.

Manual calibration in 30 seconds:

1. Open the **Measure** panel (Alt+U, or click the ruler icon).
2. Click **Calibrate**.
3. Click two points on the drawing where you know the real-world distance — most people use the dimension line on a known wall, or the title-block scale bar.
4. Type the actual distance ("20'-0"" or "6.1 m" — Bluebeam handles both).
5. Done.

Two things that bite people:

- **Calibration is per-page.** If a drawing set has multiple sheets at different scales, each one needs its own calibration. Bluebeam will warn you, but only if you turn the warnings on (Settings → Preferences → Measure).

- **Viewports.** A single sheet can have multiple drawings at different scales (think: floor plan + an enlarged detail in the corner). Use **Viewports** to calibrate each region independently. Right-click → **Add Viewport**, draw a box around the detail, and calibrate inside that box. Now your tape measure knows it's in a different scale when it's inside that viewport.

> **Reality check:** if your numbers look off by a clean factor (everything is 12× bigger than it should be, or 0.083× smaller), you almost certainly have feet vs. inches mixed up. Recalibrate.

3. The 4 measurement tools you'll actually use

Bluebeam has like a dozen measurement tools. You will use four of them.

Length. Measures a straight or polyline distance. Click start, click end, double-click to finish (or click each turn for polyline). Use it for: linear footage of conduit, baseboard, weld runs, anything you'd run a tape down.

Area. Click around a closed shape. Double-click to close it. Use it for: square footage of slabs, drywall, paint, flooring, anything you'd buy by the SF.

Volume. Same as Area but adds a depth value, so SF × depth = CY (or whatever volume unit you're in). Use it for: concrete pours, excavation, fill, gravel.

Count. Click on every instance of something. The counter ticks up automatically. Use it for: light fixtures, receptacles, doors, sprinkler heads, anchors. *VisualSearch* can do this automatically by symbol — more on that below.

The trick that makes counts not painful:

After you place your first count, the next click puts another one. You don't re-pick the tool every time. Just click, click, click, click your way across the sheet. Press Esc when you're done.

The trick that makes everything not painful:

Use **Custom Columns** in the Markups List (we'll get to this in Section 6) so each measurement carries its cost code, assembly, or work breakdown structure code. Then your takeoff exports straight to Excel with categories already attached.

> **VisualSearch power move:** If you have repetitive symbols across a sheet (every door, every receptacle, every sprinkler head), draw a small box around one example, hit **Search → Visual**, and Bluebeam finds every other instance on the page or across the whole document. Hit "Add as Count Measurement" and you've just counted 400 receptacles in 20 seconds.

4. Build your first Custom Tool Set (the real superpower)

If you only learn one thing from this guide, learn this.

The **Tool Chest** is Bluebeam's library of reusable markups. Every cloud, callout, stamp, line, arrow, color, and font you've ever placed can be saved into a tool set and reused forever — and shared with your team.

This is what separates new Bluebeam users from people who fly through it. New users keep recreating the same markup over and over. Power users have a tool set with their company's standard markups already saved, and they place them in one click.

Build your first tool set in 3 minutes:

1. Open the **Tool Chest** panel (Alt+X, or the toolbox icon).
2. At the top, click the menu → **Add Tool Set** → name it something useful ("Foreman — Daily" or "Estimating — Concrete").
3. Place a markup on a drawing the way you like it — say, a red cloud with a "REVISE" callout, or a blue arrow with your initials.
4. Right-click the markup → **Add to Tool Chest** → pick your new tool set.
5. Repeat for every markup you find yourself making more than once.

What to put in your first tool set (suggestions by trade):

If you're an estimator: count tools for each major equipment type, area tools color-coded by trade, your standard "Per Specification" callout.

If you're a foreman/super: a "Punch" stamp, a red cloud, a blue cloud (different cloud colors mean different things — you decide), an "AS-BUILT" stamp with your initials, a green checkmark.

If you're a PM: an RFI callout, a Submittal callout, a red flag for cost-impact items, a clean text box pre-styled with your font and color.

Two modes that change how tools behave:

Click the gear/settings on a tool in the Tool Chest and you can toggle between:

- **Properties Mode** — places the tool but lets you re-type the content each time. Good for callouts where the text changes.
- **Drawing Mode** — places it exactly the same every time. Good for stamps, logos, standard symbols.

> **Killer move:** export your tool set (Tool Chest menu → **Export**) as a `.btx` file and email it to your team. They import it, suddenly the whole company is marking up drawings with the same standard symbols. This single trick is worth the price of the software.

5. Sets — turn 100 PDFs into 1 document

If you've ever opened a construction drawing package and gotten 47 separate PDFs (`A-101.pdf`, `A-102.pdf`, `S-201.pdf`...) you know the pain. **Sets** combines them into one logical document with a navigable sheet index, page labels that match the actual drawing numbers, and full search across all of them at once.

Build a Set:

1. Drop all the PDFs into one folder.
2. **File** → **New** → **Set** → point at the folder.
3. Bluebeam reads the title blocks, pulls page labels, and stitches everything into one navigable document.
4. Save it as a `.bex` file. That's your Set.

Why this matters in the field:

- Open one file instead of 47.
- Search "EXISTING" across the whole drawing package and find every occurrence on every sheet.
- Flip pages with Page Up/Page Down without quitting and reopening files.

- Hyperlinks between sheets work — click a callout that says "see S-302" and Bluebeam jumps you there.

When you get a revision:

Don't rebuild the Set from scratch. Use **Slip Sheet** (Section 7) to swap the old sheets for the new ones. Markups stay in place.

6. The Markups List is a spreadsheet hiding in plain sight

Open the **Markups List** panel (Alt+L). Every markup, measurement, callout, count, and stamp on the document shows up as a row.

This panel is not a viewer. It's a database.

What you can do with it:

- **Sort and filter** by author, color, status, page, subject — anything.
- **Add Custom Columns** for cost code, assembly, status, due date, assignee, RFI number, or whatever you track. The columns live with the PDF.
- **Set status** on each markup ("Open," "In Progress," "Resolved") and track punch lists right inside the drawing.
- **Export to CSV, XML, or Excel** with one click. Your takeoff numbers, RFI logs, and punch lists all flow out as structured data.

Add a Custom Column in 3 clicks:

1. Right-click a column header in the Markups List.
2. **Manage Columns → Add → Custom Column**.
3. Name it (e.g. "Cost Code"), pick a type (Text, Number, Date, Choice), and OK.

Now every markup has a Cost Code field. Type or pick from a dropdown as you go. Export to Excel. You just turned Bluebeam into a takeoff system.

> **Why this matters:** the alternative is hand-re-entering everything from a scribbled-on PDF into an Excel takeoff sheet. The Markups List makes that step disappear.

7. Slip Sheet — handle revisions without losing your markups

Construction projects revise drawings constantly. Sheet `A-201` becomes `A-201 Rev 3` becomes `A-201 Rev 4`. Without **Slip Sheet**, every revision means losing all your markups and starting over.

Slip Sheet swaps the underlying sheet (the lines, the title block, the dimensions) but keeps your markups, measurements, and tags exactly where they were. If a wall moved 6 inches, your markup is now 6 inches off — but you can see that, and fix only what changed instead of redoing the whole sheet.

How to slip-sheet a revision:

1. Open the original drawing or Set.
2. **Document → Pages → Slip Sheet** (or Batch → Slip Sheet for a whole package).
3. Point at the new revision PDF.
4. Bluebeam matches sheets by page label, slips the new content underneath your markups, and shows you a side-by-side diff.
5. Review changes, accept the slip.

The two settings that matter:

- **Match by page label** if your title blocks are clean. Faster.
- **Match by file name** if you have to.
- Always check **"Highlight changes"** — Bluebeam visually overlays what changed in the new sheet. This is gold.

> **Real talk:** the first time you slip-sheet a 200-sheet revision and watch your markups stay intact, you'll feel like you stole something.

8. Studio Sessions — collaborate live with the team

A **Studio Session** is a real-time, multi-user markup of the same PDF. You, the architect, the GC, and the inspector can all be in the same drawing at the same time, marking it up, and everyone sees changes live.

Start a Session:

1. Sign in to Bluebeam Studio (free account; uses the same login as your subscription).
2. Open a PDF (or Set).
3. **Studio panel** → **New Session** → upload the file.
4. Invite people by email. They'll get a link.
5. Everyone joins the Session, marks up the same document, and the chat panel runs alongside it.

Why this is better than emailing PDFs back and forth:

- One file. No "v3_FINAL_FINAL_DAVE.pdf."
- Everyone sees the same markups in real time.
- The Session keeps a full audit trail — who marked what, when.
- Invitees don't need a paid Bluebeam license. They can join for free with a Studio account.

Studio Sessions vs. Studio Projects:

- **Sessions** = live markup. Time-bounded. End the Session when the job is done and export the marked-up file.
- **Projects** = cloud file storage with check-in / check-out. Long-lived. Like a Dropbox built for drawings.

You'll probably use Sessions for active reviews and Projects for storing the master drawing set everyone pulls from.

Bonus: 10 keyboard shortcuts that pay rent

Memorize these. You'll save an hour a week, easily.

SHORTCUT	ACTION
G	Pan / hand tool
Alt+L	Open Markups List
Alt+X	Open Tool Chest
Alt+U	Open Measure panel
T	Text box
C	Callout
N	Cloud
Spacebar (held)	Temporary pan, no matter what tool you have selected
Ctrl+Shift+Y	Snapshot a region — paste into email or Word
Ctrl+E	Edit currently selected markup's text

> **Bluebeam ships with a giant default shortcut sheet.** Find it under **Help → Keyboard Shortcuts**. Print one and tape it to your monitor for a week.

Where to go from here

You now know enough to be dangerous. Here's where to take it next:

This week: set up one Profile, build one Custom Tool Set, calibrate one drawing, take one measurement, slip-sheet one revision. Five wins. Don't skip them.

This month: export your Tool Set and share it with one teammate. Run one Studio Session with at least two other people. Add Custom Columns to a takeoff and export to Excel.

Next month: start using Sets for any drawing package over 20 sheets. Build a "company standard" tool set library that lives on a shared drive. Set up one Studio Project for an active job.

Watch for the next videos. I publish one Bluebeam tutorial a week — real workflows from real projects. Subscribe on YouTube and you'll never have to wrestle with a PDF alone again.

About the author

David Strom lives inside Bluebeam Revu. He breaks down the parts of the software construction trades actually use — no fluff, no corporate jargon, no 200-page PDFs. New tutorials weekly.

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