PROCEDURE: ELECTRONIC PLAN REVIEW FOR CONSULTANT PLAN REVIEWER

DISCIPLINES: Structural (SS), Fire/Life Safety (FLS), Access Compliance (AC), Cal Green (CG)

PURPOSE: This procedure facilitates the Division of the State Architect’s (DSA) change from the paper design review process to a digital design review process using DSAbbox, Bluebeam Studio Projects and Sessions. This document will introduce the new digital platform for design reviews. It covers document navigation and the use of markup tools within the Bluebeam Studio Session environment. The new back check and post-approval document review steps are also outlined within.

EPR 4 Consultant Plan Reviewer

BACKGROUND: All DSA reviews will be completed in a digital format using Bluebeam Studio Projects and Sessions. All new submittals by the Design Professional of Record are submitted in PDF file format to DSAbbox per PR 18-04.BB17: Electronic Plan Review for Design Professional of Record Using Bluebeam 2017 or PR 18-04.BB18: Electronic Plan Review for Design Professional of Record Using Bluebeam 2018. A Bluebeam EPR Administrator will then create a Bluebeam Studio Project for document control and Bluebeam Studio Sessions for collaborative design reviews per PR 18-07: Electronic Plan Review for Registration and EPR Administrative Staff.

Bluebeam Studio Projects and Sessions allow internal and external stakeholders to share, view and collaborate in real time in one electronic location. Each submitted project will have a single Bluebeam Studio Project. Within each Bluebeam Studio Project, five Bluebeam Studio Sessions will be generated as required for plan review, addendums, revisions, deferred submittals and construction change documents. This gives organization to projects and allows for a well-managed project from registration through certification.

Bluebeam Studio Sessions allow for all Plan Reviewers to join a single session and comment on a single document set. Color-coded markup tools will be used to distinguish each discipline review. This new procedure reduces the resources used and is in agreement with both the Governor’s Office and Department of General Services’ sustainable policies and goals.

SCOPE: The Phase 1 plan review is completed by the intake architect. Complete submittals are moved to Phase 2 and reviewed by the Plan Reviewers in a Bluebeam Studio Project and Session. Documents for review requiring re-submittals will be uploaded to Bluebeam Studio Project and checked for formatting by DSA. After completing reviews, the Plan Reviewers and Design Professional will complete an electronic back check in the DSA back check room to confirm code compliant documents. Lead Plan Reviewers will notify the DSA EPR Administrator of an approved set of documents for stamp out and approval to Design Professional.
TABLE OF CONTENTS

1. PROJECT REVIEW
2. IN PERSON BACK CHECK AT DSA
3. POST APPROVAL DOCUMENTS

APPENDIX A
NO MONCCLATURE
A1. SETUP OF BLUEBEAM STUDIO ACCOUNT
A2. DEMO BLUEBEAM STUDIO PROJECT/SESSION AND TEST MARKUPS
A3. TOOL CHEST REFERENCE GUIDE
A4. PLAN REVIEW TRACKING TABLE
A5. RESUBMITAL BACK CHECK
A6. BLUEBEAM STUDIO EMAIL NOTIFICATION SETTINGS
A7. BLUEBEAM STUDIO SWITCH USER ACCOUNT

APPENDIX B
B1. TROUBLESHOOTING IN BLUEBEAM
B2. DSA EPR PROCEDURE SUPPORT

APPENDIX C
DOCUMENT NAMING TABLE
NOTE: Prior to participating in the Electronic Plan Review, the DSA Plan Review Consultant shall install Bluebeam 2017.0.40 and a Bluebeam Studio Account per Appendix A.

PROCEDURE:

1. PROJECT REVIEW

1.1. DSA Consultant Review

1.1.1. DSA Supervisor will notify the consultant reviewer of the project for review

1.1.2. When the Phase 1 review has been approved for completion by intake architect, the DSA Supervisor will email EPR ID code and the Bluebeam Studio Profile

1.2. Joining a Bluebeam Project and Session

1.2.1. Load Bluebeam Studio Profile

1.2.1.1. Double click DSA Profile from email

1.2.1.2. Click open

1.2.1.3. Bluebeam will open and save profile

Note: This profile must be used in all DSA Bluebeam Studio Sessions

1.2.2. Join Bluebeam Studio Project

1.2.2.1. Copy EPR ID code from the email

1.2.2.2. Open Bluebeam software

1.2.2.3. Connect to Bluebeam Studio

1.2.2.4. Under Studio tab select join

1.2.2.5. Paste the (9) digit EPR ID code from the email

1.2.2.6. Click Okay

1.2.2.7. Bluebeam Studio Project Folder structure contains the following. To expand collapsed view of folders double left click on the parent folder

<table>
<thead>
<tr>
<th>Bluebeam Project Folders</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Project Root</strong> – OFFICE_APPNO INC# PROJECT NAME</td>
<td></td>
</tr>
<tr>
<td><strong>Increment Number</strong></td>
<td></td>
</tr>
<tr>
<td><strong>A. Submission</strong></td>
<td></td>
</tr>
<tr>
<td>1. Plan Review Documents</td>
<td></td>
</tr>
<tr>
<td>2. Post Approval Documents</td>
<td></td>
</tr>
<tr>
<td>A. Deferred Submittals</td>
<td></td>
</tr>
<tr>
<td>B. Revisions</td>
<td></td>
</tr>
<tr>
<td>C. Addenda</td>
<td></td>
</tr>
<tr>
<td>D. Construction Change Documents</td>
<td>This is the Bluebeam Studio Project folder where the Design Professional submits Version 2 (_V2) and greater documents</td>
</tr>
</tbody>
</table>
B. DSA Review

1. Plan Review Documents
2. Post Approval Documents
   A. Deferred Submittals
   B. Revisions
   C. Addenda
3. Construction Change Documents

C. Approval

1. Plan Review Documents
2. Post Approval Documents
   A. Deferred Submittals
   B. Revisions
   C. Addenda
3. Construction Change Documents

This Bluebeam Studio Project folder is for DSA USE ONLY the Design Professional, and the DSA Consultant Plan Reviewer (if applicable) will not see it listed in the Bluebeam Studio Project

This is the Bluebeam Studio Project folder where DSA places the approved documents

1.2.3. Join Bluebeam Studio Session
   1.2.3.1. Right-click Project name
   1.2.3.2. Select Show Sessions
   1.2.3.3. Select Plan Review Session to join

1.2.4. Plan Review Session contains the following documents:
   1.2.4.1. “_PR Tracking Table” – This document is used to log review status, reviewer contact information and document review status
   1.2.4.2. DWG_V1 – Version 1 of the Drawings
   1.2.4.3. SPC_V1 – Version 1 of the Specifications (if applicable)
   1.2.4.4. 103_V1 – Version 1 of the DSA 103 (if applicable)
   1.2.4.5. DSA Additional Comments - These are blank pages that are added just in case the Plan Reviewer needs additional room to make comments

1.2.5. Review Session Document
   1.2.5.1. Right click on session document and select Open
   1.2.5.2. Navigate pages using page labels, bookmark tab, and hyperlinks (if any)

1.2.6. Making comments
   1.2.6.1. Use the tool chest and add comments
      1.2.6.1.1. See Appendix A Section 3 for tool chest reference guide
      1.2.6.1.2. If there is not enough space to capture the comments, contact the DSA point of Contact to request additional sheets blank to be added to the Session
      1.2.6.1.3. Reference Drawings – All reference drawings
shall be submitted as separate supporting documents per PR 18-04, if there are any reference sheets the DSA Plan Reviewer shall provide comment requiring them to remove reference sheets

1.2.6.2. Edit comments on the sheet
1.2.6.2.1. Find the comment in the document set
1.2.6.2.1.1. Double click comment
1.2.6.2.1.2. Make edit
1.2.6.2.2. Edit comments in markup list
1.2.6.2.3. Click the Filter button to activate the filter feature. Go to any column, select down arrow and sort as desired.
1.2.6.2.3.1. Example: Author
1.2.6.2.4. Double click on comment text in markup list to open text edit window
1.2.6.2.5. Click outside the box to close and update comment
1.2.6.2.6. During review of a DWG_V1, clarify review status of each sheet
1.2.6.2.6.1. Provide “Y” – If Yes there are comments on the sheet and the review of the sheet is complete
1.2.6.2.6.2. Provide “N” – If there are No comments on the sheet and review of the sheet and the review of the sheet is complete

1.2.6.3. Filter comments based on individual Plan Reviewer (as required)
1.2.6.3.1. Go to Bluebeam Studio Tab
1.2.6.3.2. Click Home
1.2.6.3.3. Click Session
1.2.6.3.4. Select Session containing documents for review
1.2.6.3.5. Under Attendees right click on Plan Reviewer name and select Filter Mark-ups

1.2.6.4. While in the Bluebeam Studio session ensure online connectivity. Under the Studio tab confirm that the plug icon is green and connected.

1.2.1. Supporting Documents (see Appendix C for Document Naming Table)
1.2.1.1. Viewing Supporting Documents
1.2.1.1.1. Return to Bluebeam Studio Project
1.2.1.1.2. Double left-click on Project Name

1.2.1.1.3. Double left-click on parent folders to open Plan Review Documents Folder #increments > B. DSA Review > 1. Plan Review (See table in Appendix A Section 2.1.5.3 for Bluebeam Project folder information)

1.2.1.1.4. Right-click file > Select Open

1.2.1.2. Marking up Supporting Documents (as required)

1.2.1.2.1. Take a snapshot of section requiring markups

1.2.1.2.1.1. Select Camera Icon

1.2.1.2.1.2. Click the left top corner of the image and hold and drag to the bottom right corner of image

1.2.1.2.2. Return to Bluebeam Studio Session document and Select Ctrl+V to paste the snapshot

1.2.1.2.2.1. A snapshot can be pasted to the DSA Additional Comments document with a reference comment posted to the drawing

1.2.1.2.3. Markup section as required

1.2.1.2.4. Close supporting document

1.2.1.2.4.1. Click the gray (X) in the document name tab

1.2.1.3. Add supporting Documents to Session (as required)

1.2.1.3.1. This action is not available to the DSA Consultant Plan Reviewer. The DSA Consultant Plan Reviewer will contact the DSA Point of Contact to request supporting documents to be added to the Session

1.2.2. Update eTracker

1.2.2.1. During plan review, the DSA Consultant will contact the DSA Point of Contact once a week with percent complete from 1% to 84%

1.2.2.2. DSA Point of Contact will update eTracker Plan Check Worksheet percent complete

1.3. Completing the Submittal Review

1.3.1. After completing the review, notify the DSA Point of Contact

1.3.1.1. DSA Point of Contact will update eTracker Plan Check Worksheet to 85% complete

1.3.2. The DSA Point of Contact will set a meeting time at the DSA regional office for an oversight review

1.3.3. The Consultant Reviewer will adjust comments per review
1.3.3.1. Verify all comments are made with the color red
1.3.3.1.1. Go to Bluebeam Studio Session > Select Home > Select Plan Review Session
1.3.3.1.2. Right click on your name in the Attendee list
1.3.3.1.3. Select Filter Markups
1.3.3.1.4. Expand Markup list (this is located at the bottom of the Bluebeam screen)
1.3.3.1.5. Select Color
1.3.3.1.6. Scroll markup list to verify only colors from the tool chest are being used
1.3.3.1.7. If red is not used for a comment
1.3.3.1.7.1. Right Click on the comment
1.3.3.1.7.2. Select Properties
1.3.3.1.7.3. Change color to red

1.3.4. Updated Plan Review Tracking Table. Right Click on Session document “_PR Tracking Table.pdf” File and Select Open (For an example “_PR Tracking Table.pdf” see Appendix A Section 4)
1.3.4.1. Add Plan Review Contact Information (See Tool Chest and Appendix A Section 3.1.2 for template)
1.3.4.2. Place an “X” in the 85% Plan Review/QA Finished Status field (See Tool Chest and Appendix A Section 3.2.3 pre-created "X")
1.3.4.3. List the session documents that have comments (See Tool Chest and Appendix A Section 3.1.2 for template)
1.3.4.4. DSA Point of Contact will enter eTracker Plan Check Worksheet QA “Finish Date.”

1.3.5. Once all disciplines have been marked complete in eTracker Plan Check Worksheet, DSA EPR Administrator will invite the Design Professional of Record to the Bluebeam Studio Session to view comments.

Note: If a Supervisor/Point of Contact permits a resubmittal back check, see Appendix A Section 5. Re-submittal may be required if the project is from another office, has incomplete plans, or added scope.

2. IN PERSON BACK CHECK AT DSA

2.1. Back Check Submittal
2.1.1. The DSA Consultant Plan Reviewer will contact the DSA Point of Contact and arrange a back check appointment
2.1.2. The DSA Point of Contact will schedule the appointment at a designated back check station
2.1.3. Per PR 18-04 Section 4 the Design Professional of Record will do the following:
2.1.3.1. Report to the DSA Regional office at the scheduled appointment time
2.1.3.2. Log into DSA back room guest computer
2.1.3.3. Open Sessions
2.1.3.4. Download to local computer and open DWG_V2 (or greater), SPC_V2 (or greater, if any) and DSA103 (or greater, if any)
2.1.3.5. Notify Lead Plan Reviewer the documents are ready for preparation verification.

2.1.4. Consultant Plan Reviewer will Log in to Bluebeam Studio Sessions and Verify if all DSA red comments have been INCORPORATED (changed to green)
2.1.4.1. Switch Bluebeam Studio User Accounts per Appendix A7
2.1.4.2. Under the Bluebeam Studio Tab
   2.1.4.2.1. Click Home
   2.1.4.2.2. Locate Project on Project List
   2.1.4.2.3. Left-click Project Name
   2.1.4.2.4. Right Click Project Name
   2.1.4.2.5. Select “Show Sessions”
   2.1.4.2.6. Select Plan Review Session (if the Plan Review Session does not show)
      2.1.4.2.6.1. Select “Cancel”
      2.1.4.2.6.2. Right-click Project name
      2.1.4.2.6.3. Select “Refresh”
      2.1.4.2.6.4. Select “Show Sessions”
      2.1.4.2.6.5. Select Session
      2.1.4.2.6.6. Select Join
   2.1.4.2.7. The Consultant Plan Reviewer will verify if all DSA red comments have been INCORPORATED (changed to green) > Expand Markup list (this is located at the bottom of the Bluebeam screen) > Select Color > Verify there is no red comments
      2.1.4.2.7.1. If all DSA red comments have not been INCORPORATED, the Design Professional will INCORPORATE (changed to green) all comments and an updated submittal provided (as required).
2.1.4.2.7.2. If all DSA red comments have been INCORPORATED (changed to green), DSA Plan Reviewer will review all DSA comments and verify if they have been properly INCORPORATED

2.1.5. DSA Point of Contact will log in to electronic back check station as a Guest User and will log into Bluebeam Studio. The DSA Point of Contact will verify document preparation and add documents to Session per DSA Internal Procedure PR 18-06 Section 3

2.2. Back Check

2.2.1. Login to Bluebeam User account using the Bluebeam Studio switch user tool; see Appendix A Section 7

2.2.2. Join Bluebeam Studio Session

2.2.2.1. Right click Project Name

2.2.2.2. Select Show Sessions

2.2.2.3. Select Join

2.2.3. Review Session Document

2.2.3.1. Right click on session document and select Open

2.2.3.2. Navigate pages using page labels, bookmark tab, and hyperlinks (if any)

2.2.4. View comments based on individual DSA Plan Reviewer (as required)

2.2.4.1. Go to Bluebeam Studio and click session button

2.2.4.2. Move mouse cursor over DSA Plan Reviewer name in the DSA Attendee field

2.2.4.2.1. Right Click

2.2.4.2.2. Select Filter Markup

2.2.4.3. To clear filter, repeat steps above

2.2.5. View all INCORPORATED/green or OPEN/red comments

2.2.5.1. Expand Markup list (this is located at the bottom of the Bluebeam screen)

2.2.5.2. Select Filter > Select Color

2.2.5.3. Select down arrow and select desired color

2.2.5.3.1. To view INCORPORATED comments, select green

2.2.5.3.2. To view OPEN comments, select red

2.2.6. Each Comment will be reviewed with the Design Professional of Record, and DSA Consultant will mark OPEN or CLOSED using DSA Back Check status menu
2.2.6.1. In Mark-Up list, double left click status area and select OPEN if comment has not been corrected on this submittal

2.2.6.2. In Mark-Up list, double left click on the status area and select CLOSED if the comment has been corrected on this submittal

2.2.6.3. If the comment requires additional DSA Review, the comment can be temporarily set to ADDITIONAL REVIEW REQUIRED. In the markup list double left click on the status area, select ADDITIONAL REVIEW REQUIRED and then change to OPEN or CLOSE after the review is complete

2.2.7. Use the tool chest and add comments (as required)

2.2.7.1. See Appendix A Section 3 tool chest reference guide

2.2.8. Edit comments on the sheet

2.2.8.1. Find the comment in the document set

2.2.8.1.1. Double click comment

2.2.8.1.2. Make edit

2.2.9. Edit comments in bottom markup list

2.2.9.1. Click the Filter button to activate the filter feature. Go to any column, select down arrow and sort as desired.

2.2.9.1.1. Example: Status

2.2.9.2. Double click on comment text in markup list to open text edit window

2.2.9.3. Click outside the box to close and update comment

2.2.10. Update Plan Review Tracking Table. Right click on Session document “_PR Tracking Table.pdf” File and Select Open (for example “_PR Tracking table, see Appendix A Section 4)

2.2.10.1. Update list of session documents

2.2.10.1.1. Add new documents that have been reviewed to the list

2.2.10.1.2. If the current review file is approved, add “_A” to file name

2.2.10.1.3. If the current review file is approved as corrected add “_As corrected” to file name

2.2.10.1.4. If the current review file has no more outstanding items, provide a strikethrough the file name

2.2.11. If documents are not code-compliant, the Design Professional can make the required changes within the Bluebeam Studio Session, and the plan review will continue until code compliance is achieved. After the corrections are made and confirmed by the DSA Plan Reviewer, the comment shall be removed by the DSA Plan Reviewer.
2.2.11.1. If code compliance cannot be achieved using Bluebeam markup tools, then corrections will be made out of the Session, and the Design Professional will be required to resubmit the drawings. Refer back to Section 2.1

2.2.12. If plans are code compliant:

2.2.12.1. Update Plan Review Tracking Table

2.2.12.1.1. Right Click on Session document "_PR Tracking Table.pdf" File

2.2.12.1.2. Select Open

2.2.12.1.3. Place an "X" in the 15% Back Check Status field

2.2.12.2. For the Non-Lead Plan Reviewer Consultant reviews, the DSA Consultant will notify the DSA Point of Contact who will update eTracker Plan Check worksheet Back Check to 15% and notify the Lead Plan Reviewer

2.2.12.3. For the Lead Plan Review Consultant reviews, the DSA Consultant Reviewer will notify the DSA Point of Contact who will refer to PR 18-06 Electronic Plan Review for DSA Plan Reviewer, Section 3.6 and 3.7 for finalizing the review

3. POST APPROVAL DOCUMENTS

NOTE: Consultant reviews of post-approval documents are done in the DSA regional office. Refer to PR 18-06 for review standards.
## APPENDIX A

### NOMENCLATURE

<table>
<thead>
<tr>
<th>Term</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Bluebeam Studio Project</td>
<td>Digital space to manage project files and project review sessions.</td>
</tr>
<tr>
<td>Bluebeam Studio Session</td>
<td>Collaborative digital space for reviewing, commenting on documents and the closeout of comments.</td>
</tr>
<tr>
<td>Consultant Plan Reviewer</td>
<td>A plan reviewer hired and trained by DSA to perform document review and the back check with the design professional.</td>
</tr>
<tr>
<td>Design Professional</td>
<td>The design professional in responsible charge of the project, or his or her authorized representative.</td>
</tr>
<tr>
<td>DSAbox</td>
<td>A cloud-based storage site where DSA project files are located.</td>
</tr>
<tr>
<td>DSA Bluebeam Studio Profile</td>
<td>A DSA Bluebeam Studio Profile has been created for each discipline. The profile will layout the Bluebeam Studio Interface for digital design review and contains the tool chests required to complete each discipline’s plan review.</td>
</tr>
<tr>
<td>DSA Point of Contact</td>
<td>DSA employee assigned to a consultant reviewer to complete internal DSA tasks, uploading resubmittal documents, updating eTracker completion percentages, etc.</td>
</tr>
<tr>
<td>Electronic Back Check</td>
<td>A paperless DSA back check performed using a computer and monitors.</td>
</tr>
<tr>
<td>EPR Administrator</td>
<td>A DSA EPR Administrator will set-up Bluebeam Studio Projects and Sessions and will assign collaborators in DSAbbox, Bluebeam Studio Projects, and Sessions.</td>
</tr>
<tr>
<td>Lead Plan Reviewer</td>
<td>The DSA plan reviewer (usually the structural plan reviewer) who arranges the back check with the design professional and the other plan reviewers, and notifies DSA EPR Administrator when the plan review documents are approvable.</td>
</tr>
<tr>
<td>OTC Review</td>
<td>DSA offers OTC project review for eligible projects to expedite the review and approval process. DSA’s OTC process is primarily intended for single-story relocatable buildings, and other simple projects, utilizing designs that have been pre-approved per DSA procedure PR 07-01: Pre-Check Approval.</td>
</tr>
<tr>
<td>Plan Review Tracking Table</td>
<td>A document (PR Tracking Table.pdf) that is placed in the Plan Review Session and is used to keep track of the plan review status of each document. This document is for DSA use only.</td>
</tr>
<tr>
<td>Record Set</td>
<td>The documents that get approved, stamped and uploaded to the DSAbbox and Bluebeam Studio Project Approved folder.</td>
</tr>
</tbody>
</table>
A1. SETUP OF BLUEBEAM STUDIO ACCOUNT

First Time User – Section 1.1 – Setup with New Account

Previous DSA Bluebeam User – Section 1.2 – Setup/Verify Existing Account

A1.1. Setup with New Account

NOTE: The following procedure is a one-time process

A1.1.1. Open Bluebeam Studio software

A1.1.2. A window will appear; if it does not, go to Appendix B Section 1.1.
   A1.1.2.1. Click Create New
   A1.1.2.2. Click Agree

A1.1.3. Change username to: (First Last, Company)
   A1.1.3.1. Example: Jane Smith, AECOM

A1.1.4. Add your email

A1.1.5. Create a password (Must include: upper case, lower case, # and special character)

A1.1.6. Check Remember Password

A1.1.7. Click Okay

A1.1.8. You have now created your Bluebeam Studio account
   A1.1.8.1. If you receive an error message, please see Appendix B Section 1.2.

A1.1.9. Open the welcome email from Bluebeam Studio
   A1.1.9.1. Click Validate Email
   A1.1.9.2. Return to Bluebeam

A1.1.10. Go to Settings (upper right) > Click Preferences

A1.1.11. Click on Markup > Check Autosize Text Box and Callout Markups

A1.1.12. Go to General
   A1.1.12.1. Confirm name in user box (First Last, Company)
   A1.1.12.2. Click Okay

A1.1.13. Proceed to Appendix A Section 2.

A1.2. Setup/Verify Existing Account

NOTE: The following procedure is a one-time process

A1.2.1. Open Bluebeam Studio software

A1.2.2. Go to Settings (upper right) > Click Preferences

A1.2.3. Go to Studio
   A1.2.3.1. Click Login
A1.2.4. Enter Email and Password
  A1.2.4.1. Check Remember Password
  A1.2.4.2. Click Okay
A1.2.5. Click Manage Servers
A1.2.6. Double left click the email address
A1.2.7. Check name for the proper naming convention; see Appendix A Section 1.1.3
  A1.2.7.1. First Last, Company
  A1.2.7.2. Jane Smith, AECOM
  A1.2.7.3. Click Okay
  A1.2.7.4. Click Close
A1.2.8. If incorrect, go to Appendix B Section 1.3.
A1.2.9. Click on Markup > Check Autosize Text Box and Callout Markups
A1.2.10. Go to General
  A1.2.10.1. Confirm Name in user box (First Last, Company)
  A1.2.10.2. Click Okay
A1.2.11. Proceed to Appendix A Section 2.

A2. DEMO BLUEBEAM STUDIO PROJECT/SESSION AND TEST MARKUPS

A2.1. DSA Profile
  A2.1.1. Double left click on the DSA Profile received in an email from DSA
  A2.1.2. Loads:
    A2.1.2.1. Markup tools
    A2.1.2.2. Custom DSA Back Check Status menu
    A2.1.2.3. Status bars

NOTE: DSA Profile must be used in all Bluebeam Studio Sessions
A2.1.3. Bluebeam may close, reopen
A2.1.4. Note Location of tools; see Section 3 for tool chest reference guide
  A2.1.4.1. The tool chests are located under the gold tool chest tab
A2.1.5. Join Studio Project
  A2.1.5.1. Click Join
  A2.1.5.2. Enter Bluebeam Studio Project ID Number: 543-932-143
A2.1.5.3. Bluebeam Studio Project Folder Structure contains the following. To expand the collapsed view of folders, double left click on the parent folder

<table>
<thead>
<tr>
<th>Bluebeam Project Folders</th>
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<tr>
<td>Project Root – OFFICE_APPNO INC# PROJECT NAME</td>
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<tr>
<td>Increment Number</td>
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<tr>
<td>B. Revisions</td>
<td></td>
</tr>
<tr>
<td>C. Addenda</td>
<td></td>
</tr>
<tr>
<td>D. Construction Change Documents</td>
<td></td>
</tr>
<tr>
<td>C. Approval</td>
<td></td>
</tr>
<tr>
<td>1. Plan Review Documents</td>
<td></td>
</tr>
<tr>
<td>2. Post Approval Documents</td>
<td></td>
</tr>
<tr>
<td>A. Deferred Submittals</td>
<td></td>
</tr>
<tr>
<td>B. Revisions</td>
<td></td>
</tr>
<tr>
<td>C. Addenda</td>
<td></td>
</tr>
<tr>
<td>D. Construction Change Documents</td>
<td></td>
</tr>
</tbody>
</table>

A2.1.5.4. Documents will be submitted to the submission folders by the Design Professional

A2.1.5.5. DSA Plan reviewers will copy documents from the submission folders to the DSA Review folders.

A2.1.5.6. Five DSA Review Sessions will be set-up as needed to review submittals, including the following:

A2.1.5.6.1. Plan Review
A2.1.5.6.2. Deferred Submittals
A2.1.5.6.3. Revisions
A2.1.5.6.4. Addenda
A2.1.5.6.5. Construction Change Documents

A2.1.5.7. After joining the Bluebeam Studio Project, there are several ways to join the Bluebeam Studio Sessions within each project
A2.1.5.8. Open Bluebeam
A2.1.5.9. Connect to Bluebeam Studio
A2.1.5.10. Under Studio tab select “join.”
A2.1.5.11. Enter Bluebeam Studio Session ID Number: 545-676-364
A2.1.5.12. Click Okay

A2.1.6. Additional methods to join Bluebeam Studio Sessions
A2.1.6.1. Via Bluebeam Studio Project
   A2.1.6.1.1. Right Click Project name
   A2.1.6.1.2. Select Show Sessions
   A2.1.6.1.3. Select Plan Review Session to join
A2.1.6.2. Via Bluebeam Studio Session List
   A2.1.6.2.1. Select session containing document for review
A2.1.6.3. While in the Bluebeam Studio Session ensure online connectivity; under the Studio tab confirm that the plug icon is green and connected

A2.1.7. Check that naming convention is correct under “Attendees”
   A2.1.7.1. First Last, Company
A2.1.8. Open test document listed under “Documents”
   A2.1.8.1. DWG_V1
A2.1.9. View Bookmarks
   A2.1.9.1. Located under blue ribbon tab
   A2.1.9.2. Select a Page
A2.1.10. Return to Tool Chest tab
   A2.1.10.1. Add one of each Markup to the demo drawing
   A2.1.10.2. Click outside the text box / comment to finish
      A2.1.10.2.1. Text Box / Callout will autosize
A3. TOOL CHEST REFERENCE GUIDE

A3.1. My Tools

A3.1.1. The “My Tools” tool chest allows reviewers to save frequently used comments in the DSA format

A3.1.1.1. Make a comment on the document for review using the DSA Discipline tool chest
A3.1.1.2. Right click on the comment
A3.1.1.3. Select add to tool chest
A3.1.1.4. Select my tools

A3.2. DSA Discipline Tool Chests

A3.2.1. All Reviewers must use the correct color code mark ups

A3.2.1.1. See table below for discipline colors

<table>
<thead>
<tr>
<th>Color Coded Markup</th>
<th>Discipline / Profile</th>
</tr>
</thead>
<tbody>
<tr>
<td>Text Box</td>
<td>Structural and Phase 1 Reviewer</td>
</tr>
<tr>
<td>Text Box</td>
<td>Access</td>
</tr>
<tr>
<td>Text Box</td>
<td>Cal Green</td>
</tr>
<tr>
<td>Text Box</td>
<td>Fire Life Safety</td>
</tr>
</tbody>
</table>

A3.2.2. Below is a table of tool chest items and how to create each item

<table>
<thead>
<tr>
<th>Markup Tool</th>
<th>Tool Use</th>
<th>Tool Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Highlight tool – Click and drag to create highlight mark</td>
<td>Use this tool to mark off sections that have been reviewed</td>
<td></td>
</tr>
<tr>
<td>Text Box – Click to create text box, fill in with text</td>
<td>Create comment outlined in red on a document sheet</td>
<td></td>
</tr>
<tr>
<td>Callout – First left click arrow location second click text box location. Right click callout select “Add Leader” click arrow location</td>
<td>Indicate an item and comment on it. Additional leaders can be used to indicate multiple of the same item</td>
<td></td>
</tr>
<tr>
<td>Cloud Plus – Click, and drag to create rectangle for cloud. Pull away from cloud and click to create text box.</td>
<td>Outline an area for review and comment on it.</td>
<td></td>
</tr>
<tr>
<td>Dimensions – Click for start point of measurement, let go, click on end point of measurement</td>
<td>To dimension a distance.</td>
<td></td>
</tr>
<tr>
<td>Labeled Line – Click for start point of line, let go, click on endpoint of line, input label on line.</td>
<td>Note an area or distance of importance by adding a label line to area</td>
<td></td>
</tr>
<tr>
<td>Tool</td>
<td>Instructions</td>
<td>Purpose</td>
</tr>
<tr>
<td>----------</td>
<td>-----------------------------------------------------------------------------</td>
<td>-------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Rectangle</td>
<td>Click, let go, drag to create rectangle, click to add</td>
<td>Outline an area of interest or call attention to a detail</td>
</tr>
<tr>
<td>Ellipse</td>
<td>Click, let go, drag to create ellipse, click to add</td>
<td>Outline an area of interest or call attention to a detail</td>
</tr>
<tr>
<td>Polyline</td>
<td>Click for start point, click to complete first segment. Click to create second, etc. To finish double left click at end point. Using shift create 45 and 90 degree angles</td>
<td>Create quick sketch lines or strike through information.</td>
</tr>
<tr>
<td>Y</td>
<td>Select tool and click in the bottom corner of the page under review</td>
<td>When an initial plan review of a sheet is complete this mark is placed at the bottom right corner to help identify that Yes the sheet has comments</td>
</tr>
<tr>
<td>N</td>
<td>Select tool and click in the bottom corner of the page under review</td>
<td>When an initial plan review of a sheet is complete this mark is placed at the bottom right corner to help identify that No the sheet does not have comments</td>
</tr>
</tbody>
</table>
A3.2.3. DSA PR Tracking Table Tool Chest

<table>
<thead>
<tr>
<th>Tool Chest Item</th>
<th>Description of Use</th>
</tr>
</thead>
<tbody>
<tr>
<td>PR Tracking table file will be located in the session and will be filled out with the following information per discipline:</td>
<td></td>
</tr>
<tr>
<td>Plan Reviewer contact information including name, phone number and email address</td>
<td></td>
</tr>
<tr>
<td>The middle box is used for marking the current status of each discipline’s review</td>
<td></td>
</tr>
<tr>
<td>The bottom box will be used with the Document Review Summary template</td>
<td></td>
</tr>
<tr>
<td>Additional boxes can be added by the supervisor for additional reviewers.</td>
<td></td>
</tr>
<tr>
<td>(See example PR Tracking in Appendix A Section 4 for additional clarification)</td>
<td></td>
</tr>
</tbody>
</table>

First and Last Name
858-67X-XXXX
first.last@dgs.ca.gov

Plan Reviewer contact information, easily paste into the PR Tracker Table

DWG_
SPC_
103_

Document Review Summary template – add box under appropriate discipline to update and track current version under review

PROJECT IS REVIEWED BY
A DSA CONSULTANT
The DSA Point of Contact is
First and Last Name:
XXX.XXX.XXX
first.last@dgs.ca.gov

When a consultant reviewer is participating in a review add this box for the appropriate discipline color to the PR Tracker Table and include the contact information for the Consultant Point of Contact

An “X” that is used to complete the status field

A4. PLAN REVIEW TRACKING TABLE

A4.1.1. During the review of a project, each reviewer will use the PR Tracking Table to catalog the documents under review

A4.1.1.1. Using the PR Tool Chest, Plan Reviewers will update the table with contact information, review status and reviewed documents (See Appendix A Section 3 for tool descriptions)

A4.1.1.1. Add new documents that have been reviewed to the list

A4.1.1.2. If the current review file is approved add, “_A” to file name

A4.1.1.3. If the current review file is approved as corrected add “_As corrected” to file name
A4.1.1.4. If the current review file has no more outstanding items, provide a strikethrough the file name

4.1.1.4.1. Double click in the Document Review Summary
4.1.1.4.2. Highlight the text to be crossed out
4.1.1.4.3. Go to the properties tab on the right-hand side of the Bluebeam Screen
4.1.1.4.4. Edit text style to strikethrough
4.1.1.4.5. Click outside the box

A4.1.2. Below is an example of how the “_PR Tracking Table.pdf” will look when a project has been completed

A4.1.3. DSA EPR Administrator will use the PR tracking table to identify the documents to be stamped out and archived

<table>
<thead>
<tr>
<th>Plan Review Tracking Table</th>
<th>(FOR DSA USE ONLY)</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Structural</strong></td>
<td><strong>Fire Life Safety</strong></td>
</tr>
<tr>
<td>Review By: Paul Rooney</td>
<td>Janet Talayen</td>
</tr>
<tr>
<td>558-673-0501</td>
<td>650-474-5427</td>
</tr>
<tr>
<td><a href="mailto:paul.rooney@dgcs.ca.gov">paul.rooney@dgcs.ca.gov</a></td>
<td><a href="mailto:janet.talayen@dgcs.ca.gov">janet.talayen@dgcs.ca.gov</a></td>
</tr>
<tr>
<td>Status: X</td>
<td>Not Required</td>
</tr>
<tr>
<td></td>
<td>85% Plan Review/QA Finished</td>
</tr>
<tr>
<td></td>
<td>15% Back Check</td>
</tr>
<tr>
<td>Document Review Summary:</td>
<td>DWG_V1</td>
</tr>
<tr>
<td></td>
<td>SPC_V1</td>
</tr>
<tr>
<td></td>
<td>103_V1</td>
</tr>
<tr>
<td></td>
<td>DWG_V2</td>
</tr>
<tr>
<td></td>
<td>SPC_V2</td>
</tr>
<tr>
<td></td>
<td>103_V2_A</td>
</tr>
<tr>
<td></td>
<td>DWG_V3_A</td>
</tr>
<tr>
<td></td>
<td>SPC_V3_A</td>
</tr>
</tbody>
</table>

A5. RESUBMITTAL BACK CHECK

A5.1. Resubmittal of Documents

NOTE: Consultant Plan Reviewers will not be uploading resubmittal documents to Bluebeam Studio Sessions; the DSA Point of Contact will do this.

A5.1.1. Receive notification of resubmittal from the Design Professional

A5.1.2. Consultant Plan Reviewer will Log in to Bluebeam Studio Sessions and Verify if all DSA red comments have been INCORPORATED (changed to green)

A5.1.2.1. Switch Bluebeam Studio User Accounts per Appendix A7
A5.1.2.2. Under the Bluebeam Studio Tab
   A5.1.2.2.1. Click Home
   A5.1.2.2.2. Locate Project on Project List
   A5.1.2.2.3. Left-click Project Name
   A5.1.2.2.4. Right Click Project Name
   A5.1.2.2.5. Select “Show Sessions”
   A5.1.2.2.6. Select Plan Review Session (if the Plan Review Session does not show)
      A5.1.2.2.6.1. Select “Cancel”
      A5.1.2.2.6.2. Right-click Project name
      A5.1.2.2.6.3. Select “Refresh”
      A5.1.2.2.6.4. Select “Show Sessions”
      A5.1.2.2.6.5. Select Session
      A5.1.2.2.6.6. Select Join

A5.1.3. The Consultant Plan Reviewer will verify if all DSA red comments have been INCORPORATED (changed to green)>Expand Markup list (this is located at the bottom of the Bluebeam screen) > Select Color >Verify there is no red comments
   A5.1.3.1. If all DSA red comments have not been INCORPORATED, the Design Professional will INCORPORATE (changed to green) all comments and an updated submittal provided (as required).
   A5.1.3.2. If all DSA red comments have been INCORPORATED (changed to green), DSA Plan Reviewer will review all DSA comments and verify if they have been properly INCORPORATED

A5.1.4. Notify the DSA Point of Contact of resubmittal and request document preparation to be verified and documents added to sessions

A5.1.5. Receive notification from the DSA Point of Contact that resubmittal documents have been added to the Bluebeam Studio Session

A5.2. Review Resubmittal
   A5.2.1. Join Bluebeam Studio Session
      A5.2.1.1. Right-click Project Name
      A5.2.1.2. Select Show Sessions
      A5.2.1.3. Select Plan Review Session to join
   A5.2.2. Review Session Document
      A5.2.2.1. Right-click on Session document and select Open
      A5.2.2.2. Navigate pages using page labels, bookmark tab, and hyperlinks (if any)
A5.2.3. View comments based on individual DSA Plan Reviewer (as required)
A5.2.3.1. Go to Bluebeam Studio and click session button
A5.2.3.2. Move mouse cursor over DSA Plan Reviewer name in the DSA Attendee field and Right Click
A5.2.3.2.1. Select Filter Markup
A5.2.4. View all INCORPORATED/green or OPEN/red comments
A5.2.4.1. Expand Markup list (this is located at the bottom of the Bluebeam screen)
A5.2.4.2. Select Filter > Select Color
A5.2.4.3. Select down arrow and select desired color
A5.2.4.3.1. To view INCORPORATED comments, select green
A5.2.4.3.2. To view OPEN comments, select red
A5.2.5. Update Comment Status to OPEN or CLOSE
A5.2.5.1. In Mark-Up list, double left click status area and select OPEN if a comment has not been corrected on this submittal
A5.2.5.2. In Mark-Up list, double left click on Status Area and select CLOSED if a comment has been corrected on this submittal
A5.2.5.3. If a comment requires additional DSA Review, the comment can be temporarily set to ADDITIONAL REVIEW REQUIRED. In the Mark-Up list double left click on Status Area, select ADDITIONAL REVIEW REQUIRED and then change to OPEN or CLOSE after review is complete
A5.2.6. Use the tool chest and add comments (as required)
A5.2.6.1. See Appendix A Section 3, tool chest use
A5.2.7. Edit comments on sheet
A5.2.7.1. Find the comment in the document set
A5.2.7.1.1. Double click comment
A5.2.7.1.2. Make edit
A5.2.8. Edit comments in Mark-Up list
A5.2.8.1. Click the Filter button to activate the filter feature. Go to any column, select down arrow and sort as desired.
A5.2.8.1.1. Example: Color
A5.2.8.2. Double click on comment text in Mark-Up list to open text edit window
A5.2.8.3. Click outside the box to close and update comment
A5.2.9. Updated Plan Review Tracking Table. Right Click on Session document "PR Tracking Table.pdf" File and Select Open (For an example "_PR Tracking Table.pdf" see Appendix A Section 4)
A5.2.9.1. Update list of session documents
A5.2.9.1.1. Add new documents that have been reviewed to the list
A5.2.9.1.2. If the current review file is approved, add “_A” to file name
A5.2.9.1.3. If the current review file is approved as corrected, add “_As corrected” to file name
A5.2.9.1.4. If the current review file has no more outstanding items, provide a strikethrough the file name

A5.2.10. Once the resubmittal review is complete, the reviewer will notify the Design Professional of the completed review.

A6. BLUEBEAM STUDIO EMAIL NOTIFICATION SETTINGS

A6.1. Plan Reviewer Settings
A6.1.1. Go to the settings icon in the upper right-hand corner of the Bluebeam Screen
A6.1.2. Go to preferences at the bottom of the drop-down menu
A6.1.3. In the preferences window on the left-hand side bar, scroll to and select Studio
A6.1.4. Select Notification Preferences link
A6.1.5. Web page will open
A6.1.6. Check “Send me an email with Markup Alerts for all Session”
A6.1.7. Check “Send me an email when an active Project is updated”
A6.1.8. Confirm all other Account Preference items are unchecked
A6.1.9. Click apply
A6.1.10. Close webpage

A7. BLUEBEAM STUDIO SWITCH USER ACCOUNT

A7.1.1. Go to Bluebeam Studio tab
A7.1.2. Click drop-down arrow next to connectivity icon
A7.1.3. Select Switch User
A7.1.4. Enter email address and password
A7.1.5. Click Okay
A7.1.6. Ensure proper profile for discipline
A7.1.6.1. Go to View
A7.1.6.2. Click Profile drop down
A7.1.6.3. Select DSA Discipline profile
APPENDIX B

B1. TROUBLESHOOTING IN BLUEBEAM

B1.1. Creating an Account

B1.1.1. Open Bluebeam Software
B1.1.2. If the window with option to create an account does not appear;
B1.1.3. Go to Settings > Preferences
B1.1.4. Go to Studio > Login
B1.1.5. Click Create Account
B1.1.6. Return to Appendix A Section 1.1.3

B1.2. Login Errors

B1.2.1. You created a new account – Email already in use

B1.2.1.1. Click Okay > Cancel
B1.2.1.2. Login using DSA email

B1.2.2. Forgot Password

B1.2.2.1. Enter email in login window then click lost password
B1.2.2.2. Follow emailed instructions
B1.2.2.3. Return to Appendix A Section 1.2

B1.2.3. Other Errors

B1.2.3.1. Confirm that the email and password were entered properly
B1.2.3.2. Clicked “forgot password” – no email received

B1.2.3.2.1. Confirm email was entered properly
B1.2.3.2.2. Check spam folder in email
B1.2.3.2.3. An account may not exist – Go to Appendix B Section 1.1 to create an account
B1.3. Incorrect Naming Convention

B1.3.1. Name in the edit server window is incorrect
B1.3.2. Click Manage Servers
B1.3.3. Double left-click the email address
B1.3.4. Check name for the proper naming convention
  B1.3.4.1. If it is selectable, edit it at this time
    B1.3.4.1.1. First Last, Company
    B1.3.4.1.2. Return to Appendix A Section 1.2.9.
  B1.3.4.2. If it is grayed out, go to studio.bluebeam.com
B1.3.4.3. Log in using DSA email and Bluebeam password
B1.3.4.4. Go to My Profile
  B1.3.4.4.1. Update Default Name
    First Last, Company
  B1.3.4.5. Return to Bluebeam software
B1.3.4.6. Log out
B1.3.4.7. Return to Appendix A Section 1.2.1

B1.4. Send Bluebeam Studio Support Ticket

B1.4.1. Go to “Help” located across the top of the Bluebeam Window
B1.4.2. Click Contact (Life Preserver Ring Icon)
B1.4.3. Select Technical Support
B1.4.4. Attach Log Files window will appear
  B1.4.4.1. Click “Yes” to send all information to Bluebeam Studio
B1.4.5. An email will open in the local email application
B1.4.6. Include a brief description of the issue and send

B1.5. Update Bluebeam Studio Profile

B1.5.1. DSA will email new profile
B1.5.2. Save profile to local location
  Example: Desktop
B1.5.3. Open Bluebeam software
B1.5.4. Across the top of the Bluebeam Window go to View
B1.5.5. Click Profiles (Person Icon in Blue Shirt)
  B1.5.5.1. Manage Profiles window opens
B1.5.5.2. Remove current profile
  B1.5.5.2.1. Change Active profile drop down to a profile
    that is different than the one being removed
B1.5.5.2.2. Find DSA discipline from list
ELECTRONIC PLAN REVIEW FOR CONSULTANT PLAN REVIEWER

1.5.5.2.2.1. Right Click to highlight
1.5.5.2.2.2. Select Delete

B1.5.5.3. Load new profile
  B1.5.5.3.1. Click Import
  B1.5.5.3.2. Windows Explorer window will open
  B1.5.5.3.3. Go to the location where the new profile is saved
      1.5.5.3.3.1. Profile will load
  B1.5.5.3.4. Change Active profile to DSA discipline
  B1.5.5.3.5. Click Okay

B2. DSA EPR PROCEDURE SUPPORT
  B2.1.1. Send Email to DSAEPRSupport@dgs.ca.gov
# APPENDIX C

## DOCUMENT NAMING TABLE

<table>
<thead>
<tr>
<th>Document Type</th>
<th>Initial Plan Review</th>
<th>Resubmitted Plan Review Docs with</th>
<th>Supporting Document Type (examples shown)</th>
<th>Naming Convention</th>
<th>Naming Convention with Increment (Increment 1 example shown)</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Submittal Docs with</td>
<td>Version 1 (V1) Identifier</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>DSA 103</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Drawings</td>
<td>DWG_V1</td>
<td>INC 01_DWG_V1</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Specifications</td>
<td>SPC_V1</td>
<td>INC 01_SPC_V1</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>DSA 103</td>
<td>103_V1</td>
<td>INC 01_103_V1</td>
</tr>
<tr>
<td></td>
<td>Supporting Document</td>
<td></td>
<td>Structural Calcs</td>
<td>Structural Calcs_V1</td>
<td>INC 01_Structural Calcs_V1</td>
</tr>
<tr>
<td></td>
<td>Type</td>
<td></td>
<td>Hydraulic Calcs</td>
<td>Hydraulic Calcs_V1</td>
<td>INC 01_Hydraulic Calcs_V1</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Geotechnical Report</td>
<td>Geotechnical Report_V1</td>
<td>INC 01_Geotechnical Report_V1</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>DSA1_V1</td>
<td>DSA1_V1</td>
<td>INC 01_DSA1_V1</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>DSA1-MR_V1</td>
<td>DSA1-MR_V1</td>
<td>INC 01_DSA1-MR_V1</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>A#________Existing Drawings</td>
<td>A#________Existing Drawings</td>
<td>INC 01_A#________Existing Drawings</td>
</tr>
<tr>
<td></td>
<td>Additional blank</td>
<td></td>
<td>DSA Additional Comments</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>pages as required by</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>DSA</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

*All documents submitted after the initial submittal must have a sequential version number*

A Division of the State Architect (DSA) Procedure documents a process or series of steps that DSA staff and/or external stakeholders must complete in order to fulfill one or more administrative requirements of DSA's plan and construction review programs.