

BLUEBEAM GUIDE:
DIGITAL
DASHBOARDS
IN 1 HOUR



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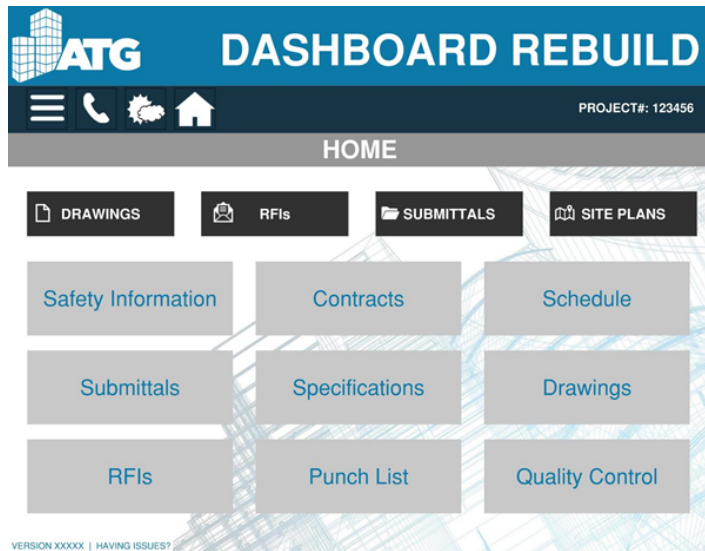
introduction

During a project's life cycle, access and file distribution becomes a tedious task. This can lead to inefficient processes and loss of valuable time. Receiving files and navigating the file structure from shared files also cultivates inefficiencies during any phase of a project. Digital Dashboards sheds new light into this process, allowing you to provide a seamless visual interface to your project partners. This enables you to distribute your files in one of the most efficient ways possible, maximizing usability and minimizing risk.

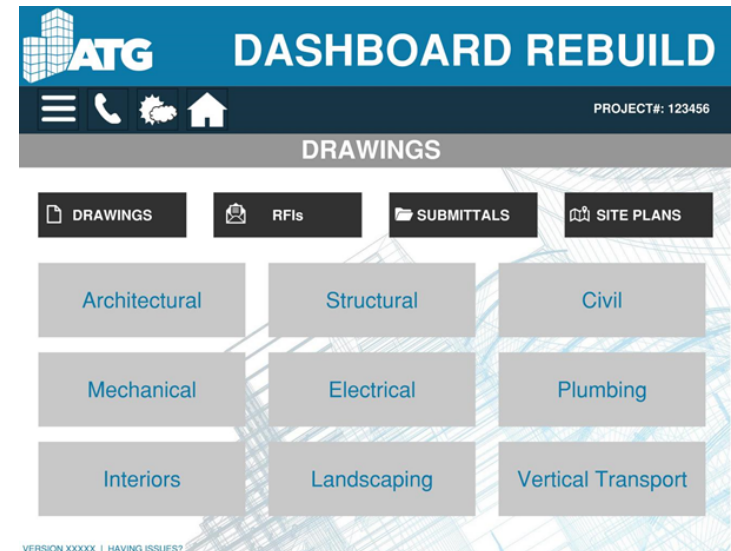
Digital Dashboards

Dashboards offer a new way to visually interact with your documents. These interactive Dashboards help owners, project managers, design teams, etc. eliminate the tedious task of explaining file structure to a coordinating party or even internal parties that might get frustrated and lose valuable time navigating them.

The Digital Dashboard below is an example of a Design Project that links you to valuable project information.



As shown above, the home page includes links or “actions” that act as clickable buttons, which bring you to subpages that help you refine your search. Below is an example where the drawings tab has been clicked and by doing so the drawings subpage appears.

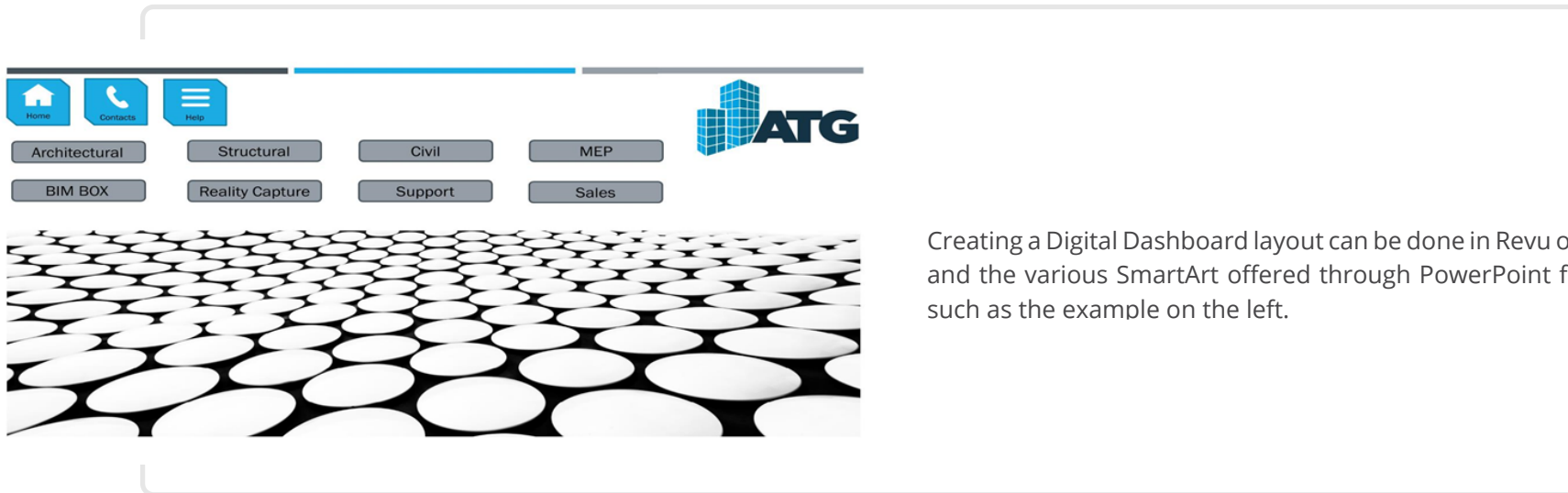


Once you enter a subpage, you have more interactive links or buttons that allow the user to navigate to more subpages in your dashboard or to a file. Links that navigate to a file on your network will quickly open that file in its native application. Elevate your dashboard by leveraging the free storage in studio projects to allow access to files anywhere and anytime.

Creating Digital Dashboards

Dashboards give Revu users a leg up in this digital world. With projects containing hundreds or maybe even thousands of documents, why not give your recipients a better way to navigate them?

This creation process is not overly complicated and can be repurposed for multiple projects. All of these “actions” or clickable links to your project information can be created in any version of Revu.



Creating a Digital Dashboard layout can be done in Revu or PowerPoint, and the various SmartArt offered through PowerPoint for the layout, such as the example on the left.

When starting a Digital Dashboard, you will need to ask yourself, who is the intended audience for the Dashboard?

This will help you formulate an idea of how you should create your Dashboard. Be sure to keep in mind that the goal for the Digital Dashboard is to simplify file access. In the following example, a Dashboard was created to aid in distribution of project documents.

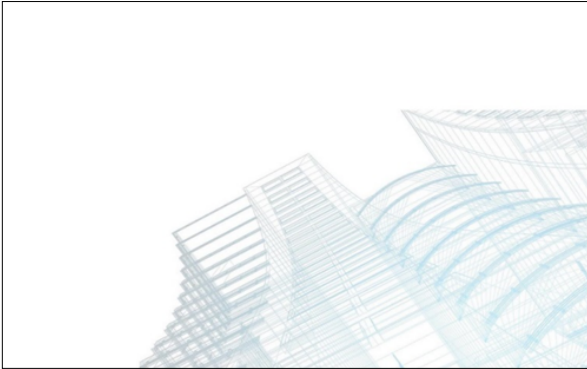
Creating Digital Dashboards (continued)

1. Pick your layout/Background.

- a. In this example, Revu was used to start the Dashboard; you can also use PowerPoint.
- b. PowerPoint offers a large range of pre-created themes.

2. I used an 8.5 X 11 as my border size, then I inserted a logo.

- a. Making your Digital Dashboards too large could have an adverse effect on keeping things simple and efficient.



3. Next, use your markup tools such as rectangle, ellipse or polygon to place shapes that are colored and filled to your choice.



4. Add logos and outlines to where links (clickable actions) will be added.

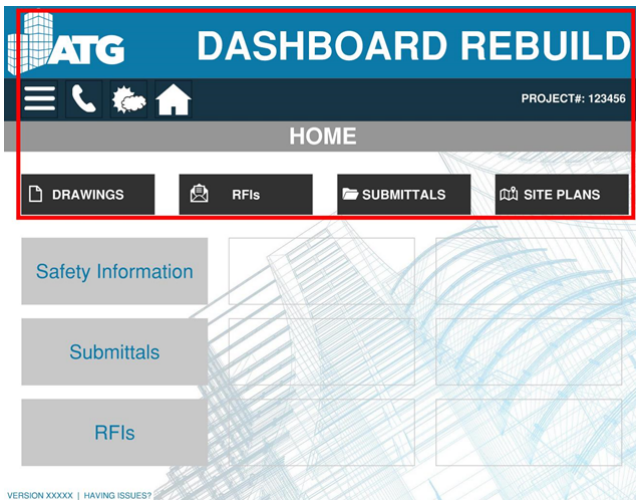
- a. Think about how you want to organize your subpages. This will help you layout your Dashboard home page which will be used as a template for your subpages.
- b. Add outlines that you will use for multiple pages.
- c. You can also start to add text that will be static at this point too.



Creating Digital Dashboards (continued)

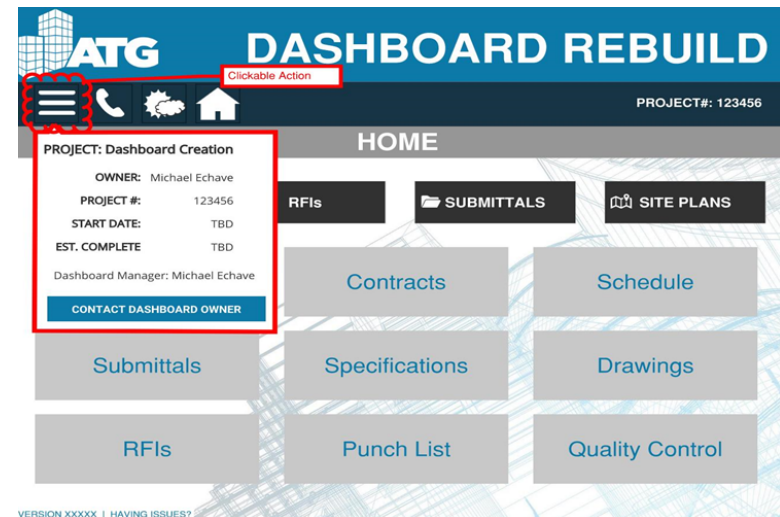
5. Next, use the Text Box Markup in Revu to create your links (clickable actions)

- You will also use images where necessary; these also act as link.
- Make sure to use interactive icons and clear fonts to keep your Digital Dashboard visually appealing for users.
- Once you have your layout complete, you will want to add links (clickable actions) to your static actions. For example, the area highlighted will never change in my subpages.



6. You will also add any static popup windows like the one shown below

- If you want more information on how to create this, reach out to [ATG](#).

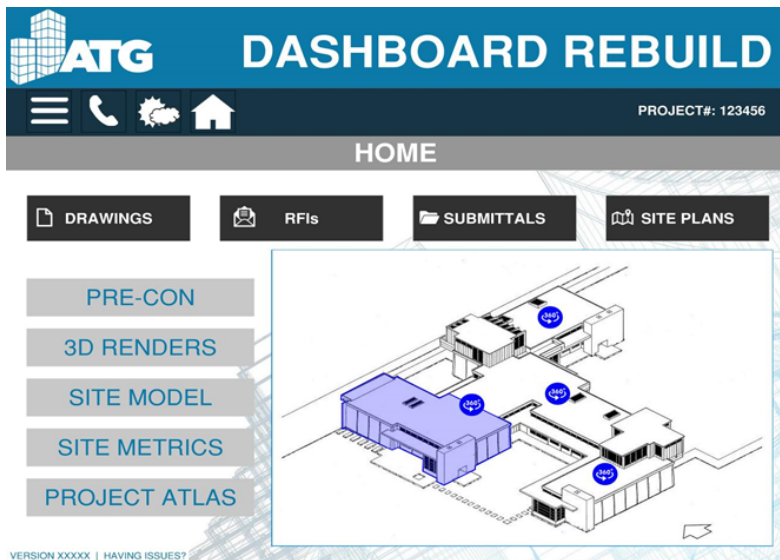


7. Next, you can easily copy this page via the thumbnails panel in Revu.

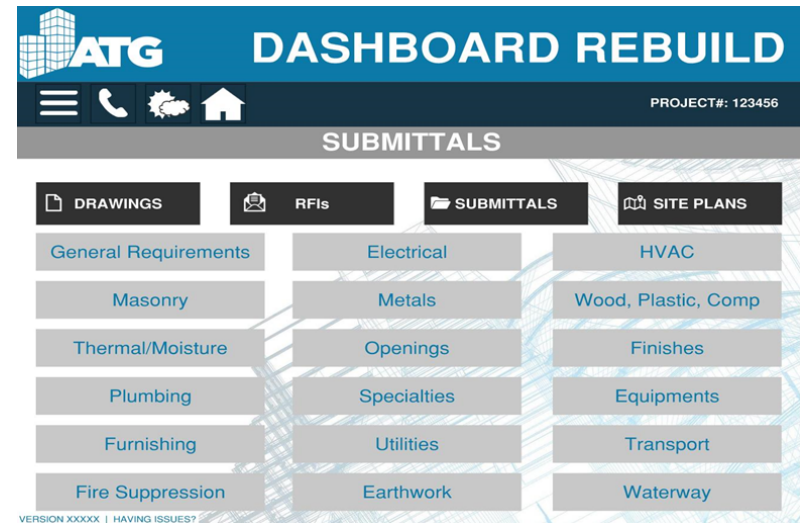
Create however many subpages you need to organize your Digital Dashboard. You can also save your text boxes or any Markup into your Tool Chest as a custom Tool Set to allow you to replace them later on or on future Digital Dashboards.

Creating Digital Dashboards (continued)

8. Once you have copied your outline for intended page count for the subpages you need, you can then start to reorganize each subpage, such as the Site Plan and Submittals on the right.



9. After all your subpages have been reorganized, it's now time to add your links (clickable **actions**) to the text boxes or images. The one important factor here is how you decide to use your links.



Links / Clickable Actions

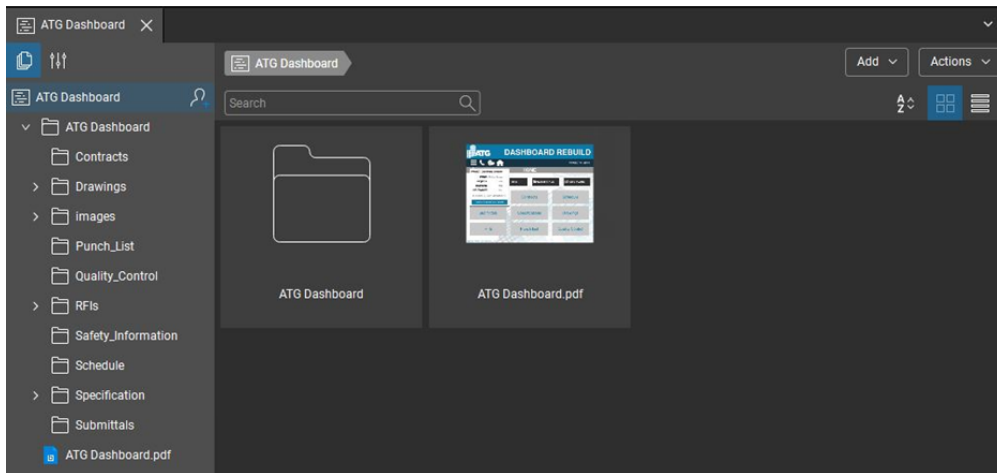
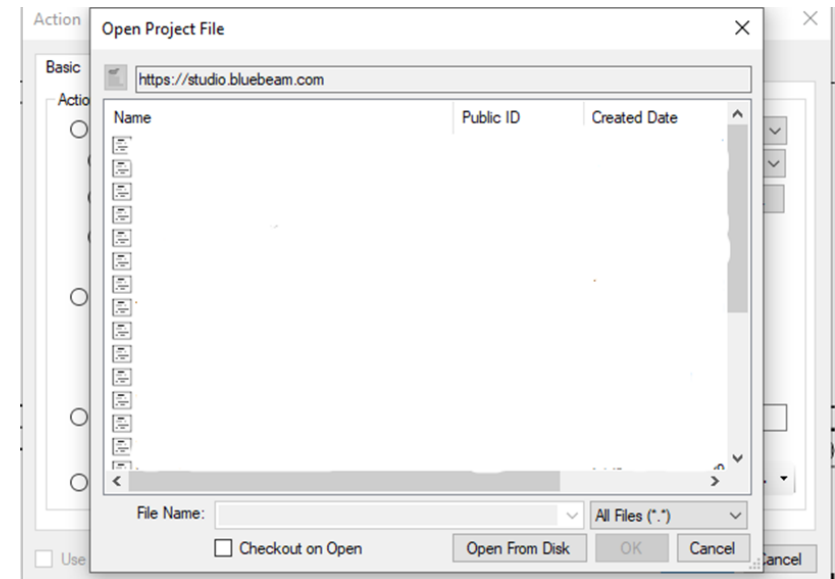
Deciding on how and where your links open is an important step in the Digital Dashboard process. To avoid any broken links, you should always double-check that your links work. It is also a good idea to have your links open a folder rather than a document; this will ensure your links are not broken.

Keep in mind, if you link to local files on your computer, other users will not be able to access them. Cloud-stored digital dashboards are an excellent idea, and these can be done in Studio Projects.

Studio Projects

Studio Projects is a powerful solution for storing and sharing an unlimited number of PDFs and any file type in the cloud.

Before you create your file access links, you should have everything completed locally, such as file structure and your Digital Dashboard minus your file access links. Then, simply drag and drop your file into Studio. You do not need to drag each individual file, just your main source folder and everything will follow. After that, you will need to change one of your preference settings so that you can link to files in your studio project. Revu Menu > Studio > deselect "Open and Save files to Studio from toolbar only." When you open your dashboard from your Studio Project and add your links, you will see a different file directory like the one on the right.



If you decide to utilize Studio Projects as file storage for your Digital Dashboards, be sure to set the proper project folder **permissions**. On the left you will find an example of a completed Digital Dashboard in a Studio Project.

If your project partners do not have a license of Revu don't fret, they can download a **free 30 day trial**. After the 30 days, Revu will turn into view mode, allowing users to continue accessing Studio.

conclusion:

Finalizing Your Dashboard

After you have everything in place, it is always a good idea to test all of your links. Keep in mind that linking to folders is a better solution. It enables you to add new files to the folders, creating a more dynamic Dashboard and preventing links from breaking. If created in Studio, you can now send out invites to project partners giving them access to your Digital Dashboard, they will receive an email asking them to join the project. You can send them a link to download a trial of Revu [here](#).

Now that your Dashboard has been completed, it is a good idea to maintain it through the project life cycle. You will want to keep all of your documents up-to-date by addressing any links that may have become broken along the way. Rest assured, now your project partners have the most up-to-date documents, paving the way to a new efficient process of document management.



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Michael is a dedicated technical specialist assisting the AEC Industry with over 5 years of experience. With his detail-oriented approach and strong passion for success, he strives to find more efficient workflows and processes by utilizing BIM.

With his help, firms can create custom content and transition from AutoCAD to REVIT. He has an Associate's of Applied Science with an emphasis in Computer Aided Design. Michael has worked with Engineers and Architects to create construction documents for projects ranging from Commercial, Industrial, Residential and Structural.

He has experience with mechanical fabrication drawings and production sets. Michael also enjoys giving back as shown when he won a design competition with Habitat for Humanity and by teaching his fellow industry colleagues on how to become more efficient in BIM and let the software work for them rather than against them.



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