



— THE —
ULTIMATE
GUIDE
— TO —
ESTIMATION
IN BLUEBEAM REVU

introduction

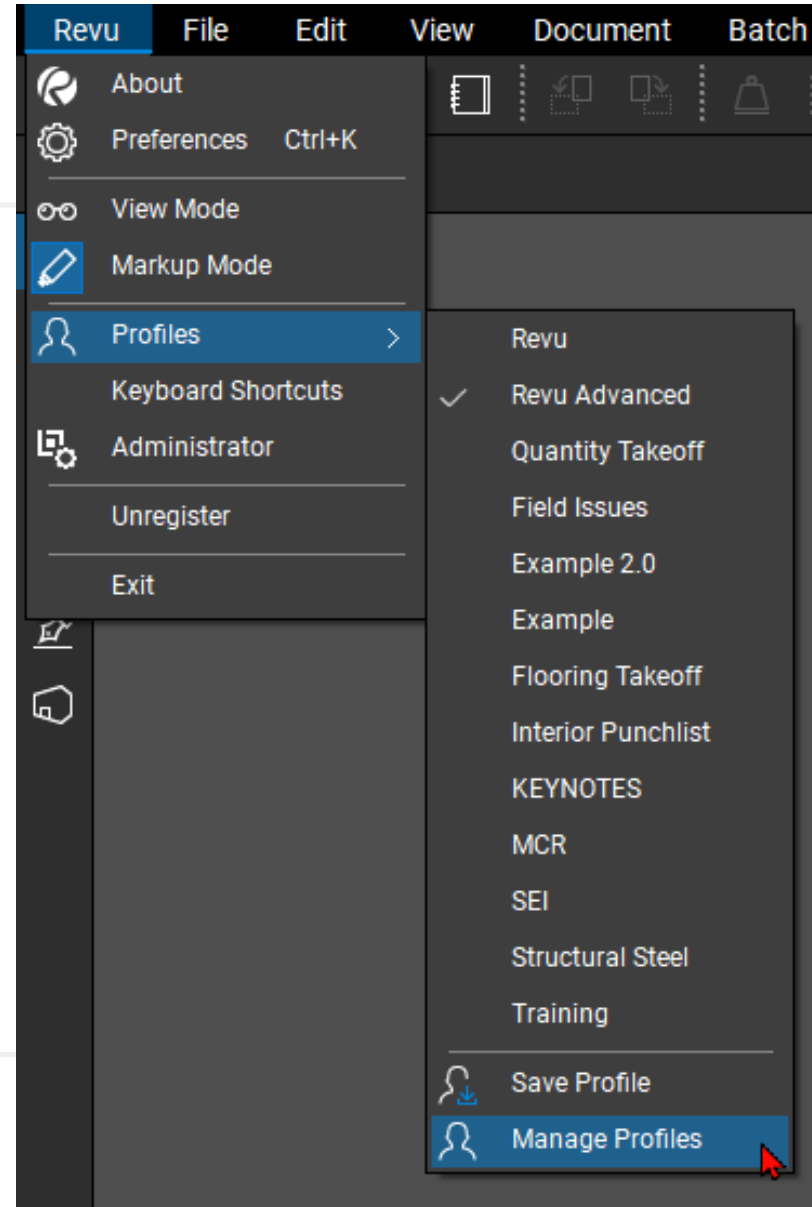
The ability to take on-screen takeoffs in our workflow is paramount in the digital age. We may have multiple products that solve our current workflow needs, but truly, we need one solution that can do it all or create an export to our pricing software. With Bluebeam Revu, we can do an on-screen takeoff on all our PDF sets. Leveraging the metadata from markups, we can have a cost total and accurate measurement data for all markups we place. We can also add the cost data, do the markups, and export the CSV or XML file with all our measurement data for importing into third-party cost software.

In this whitepaper, we'll walk you through how to create a custom profile, tool set and markup, and how to navigate the search panel and your markups list. Plus, download your FREE custom profile at the end!

Create Custom Tool Sets

To start, we need to create custom tool sets to leverage every time we open Revu for estimating. We can also tie it to a profile if we decide to use Revu for different workflows, such as project review.

To create a new profile (you'll save your tool sets and customize columns in your markups list here), go to the *Revu menu > Profile > Manage Profiles*.

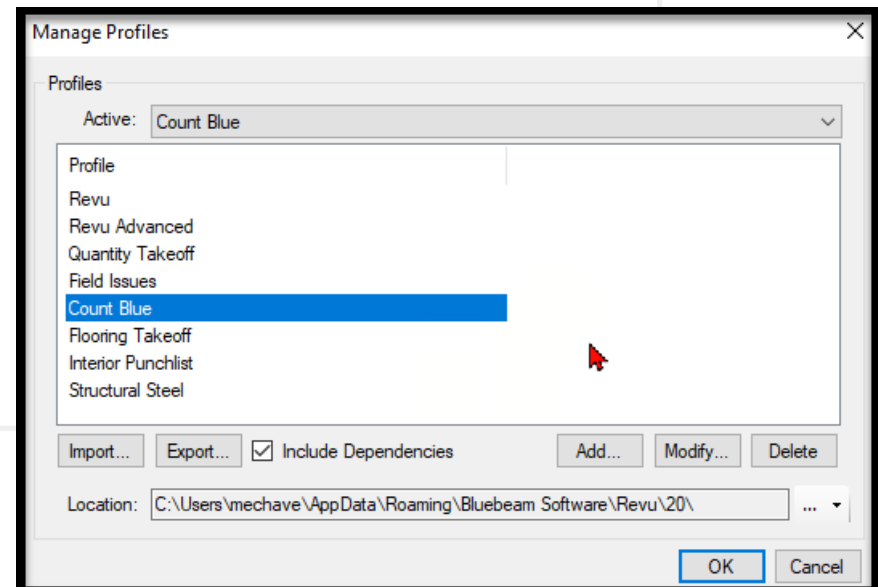
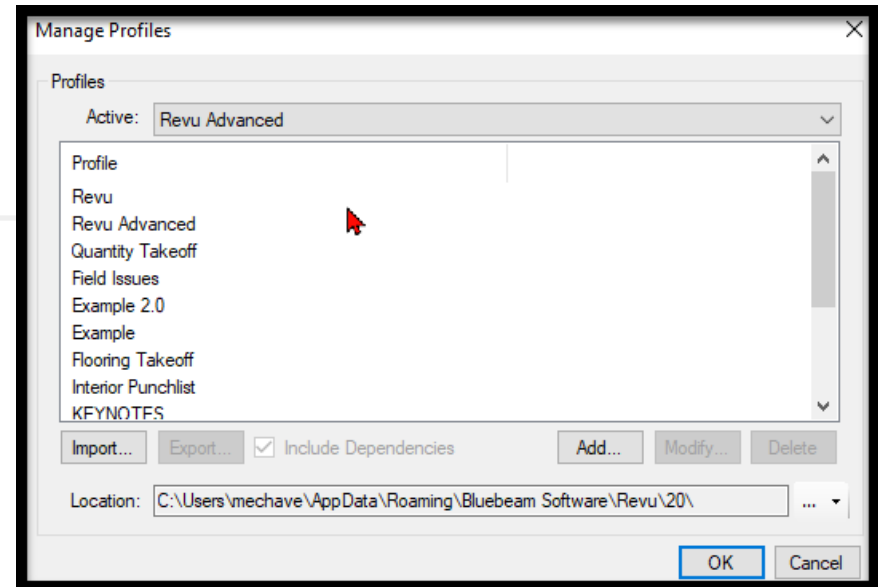


Create Custom Tool Sets (continued)


The next window will show you what has been added. *Import/Export > Active profile > add.*

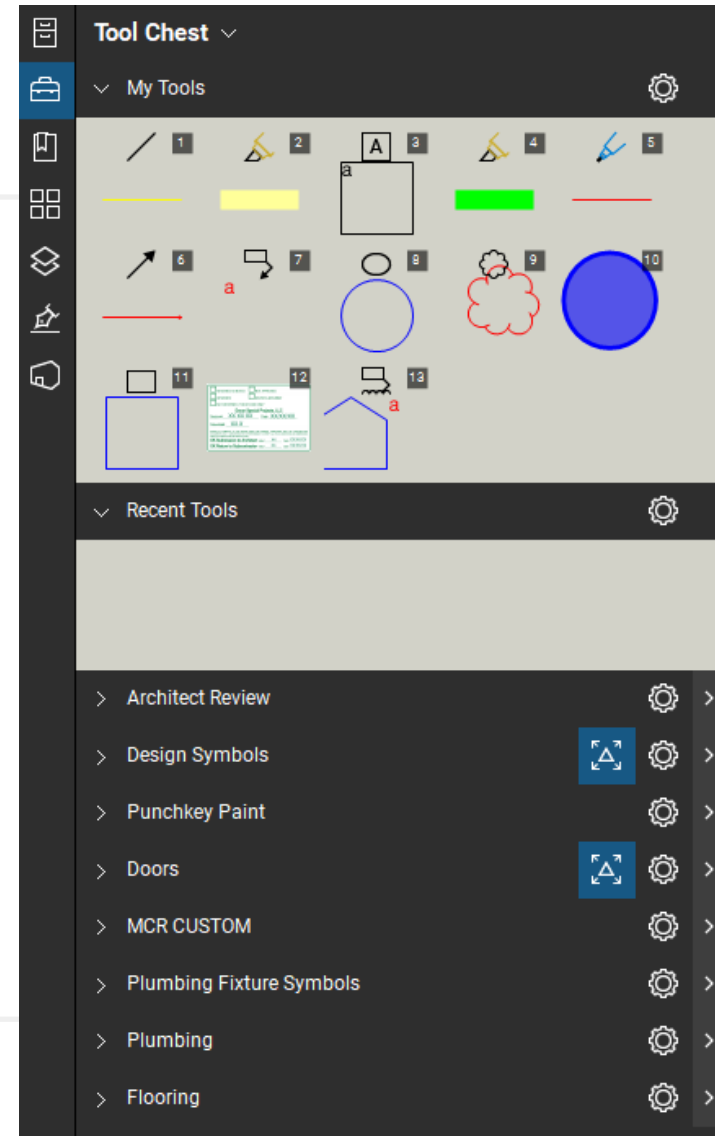
The profiles are saved out as *.BPX* files, which you can share internally or externally. To add a new one, select *add*. This generates an exact copy of your ACTIVE profile.

I will be creating a custom profile called Count Blue (available at the end of this whitepaper for FREE).



Create Custom Tool Sets (continued)

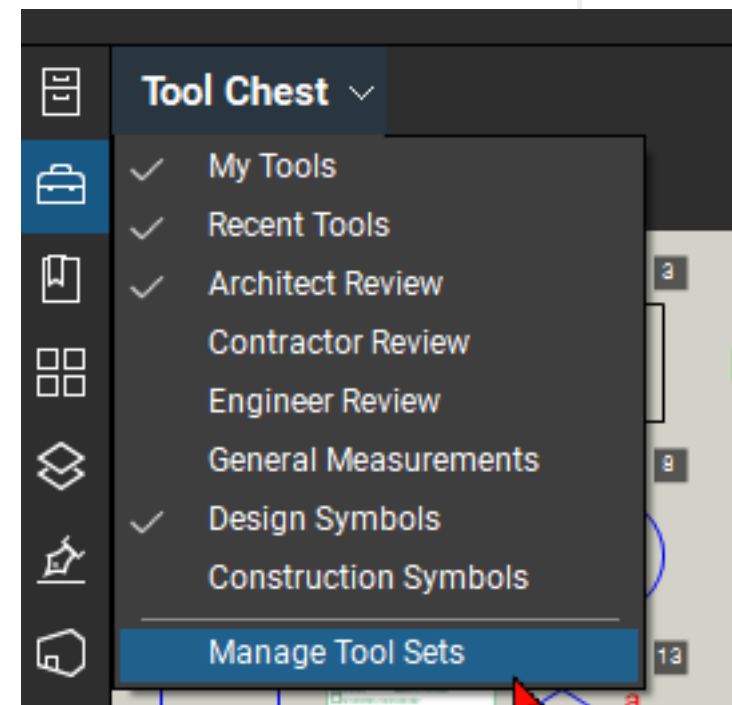
Now that we've created a new profile to use for estimating, we can start thinking about a custom tool set name that will live in our *tool chest* , which houses tool sets.



Create Custom Tool Sets (continued)

Within each tool set lives any custom markups we save. They are like an allen key set, which lives in a toolbox. When we need a specific allen key for a bolt, we go to our toolbox and pull out the allen key set and find out which one we need for the bolt.

With the tool chest, we open the correct tool set and select the correct markup for the job. To create a new tool set, *activate the tool chest panel > select the tool chest dropdown > manage tool sets.*

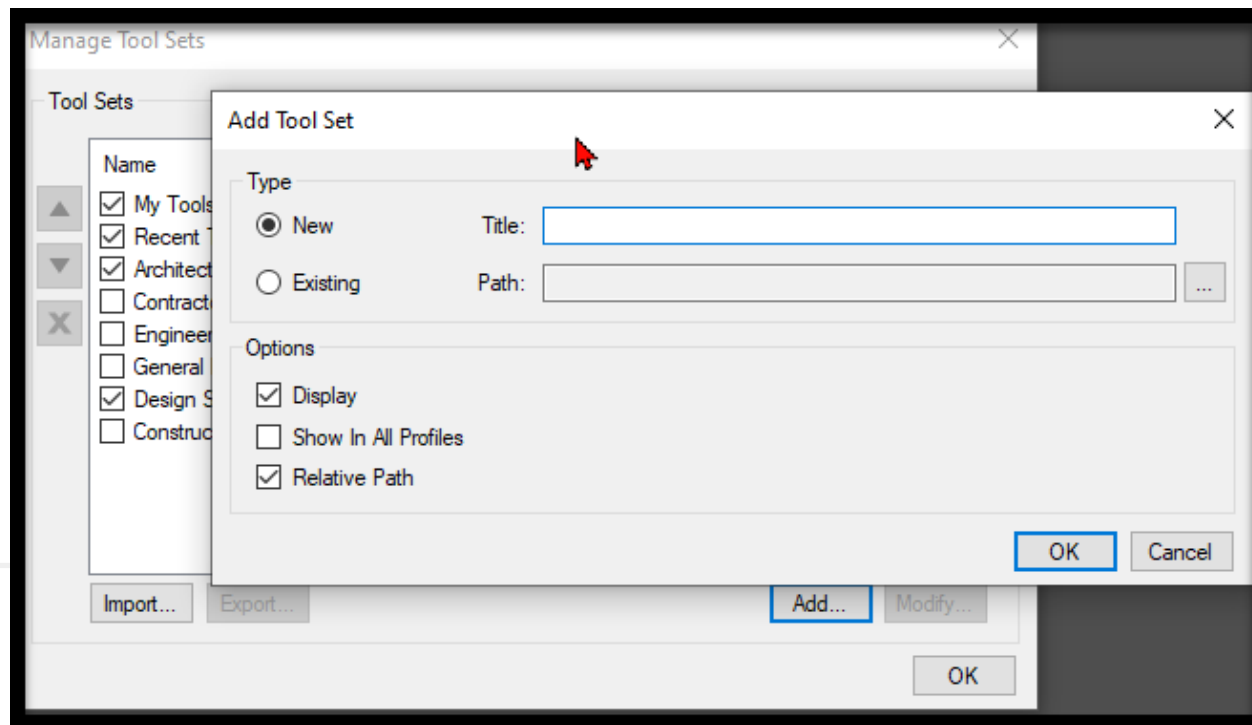


Create Custom Tool Sets (continued)

From there, you will see all your active or inactive tool sets, which you can now import or export. These files are saved out as .BTX files. Select *add* to create a new tool set.

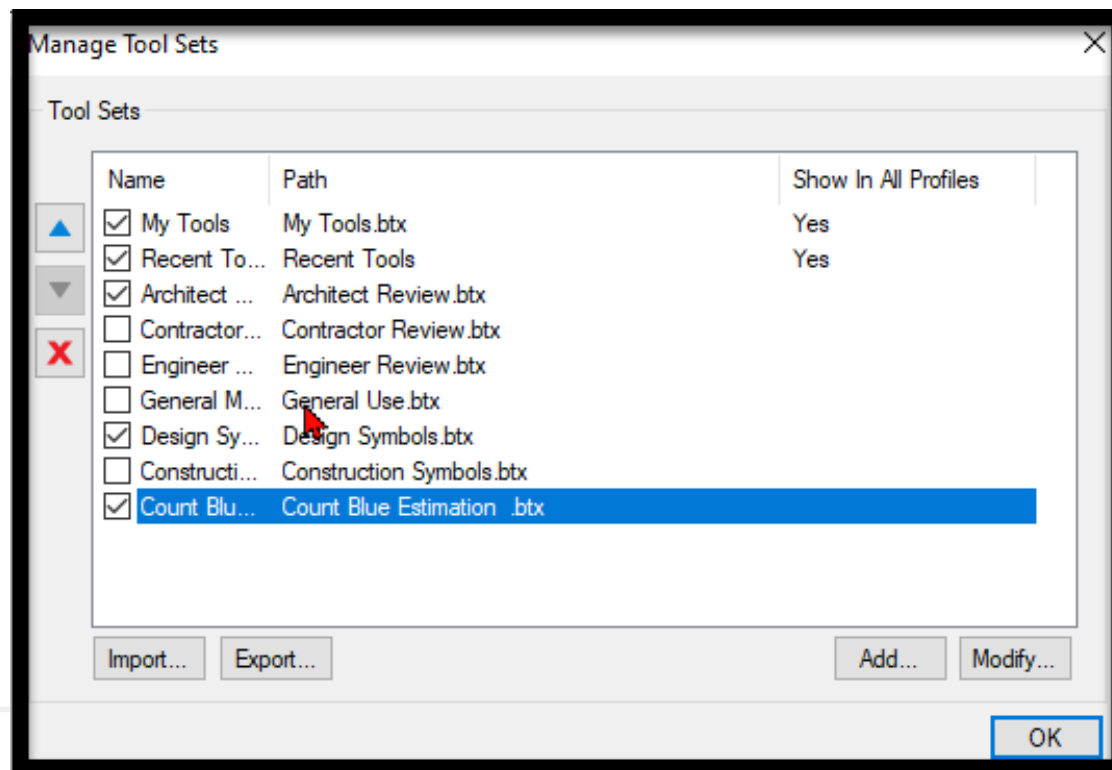
Your options below the type options allow you to either *display* them in the panel as active or not.

Show in all profiles unchecked means it will only go into the current profile and not show in all. *Relative path* is meant for how Revu searches for the saved .BTX file, by name of the file or by folder.



Create Custom Tool Sets (continued)

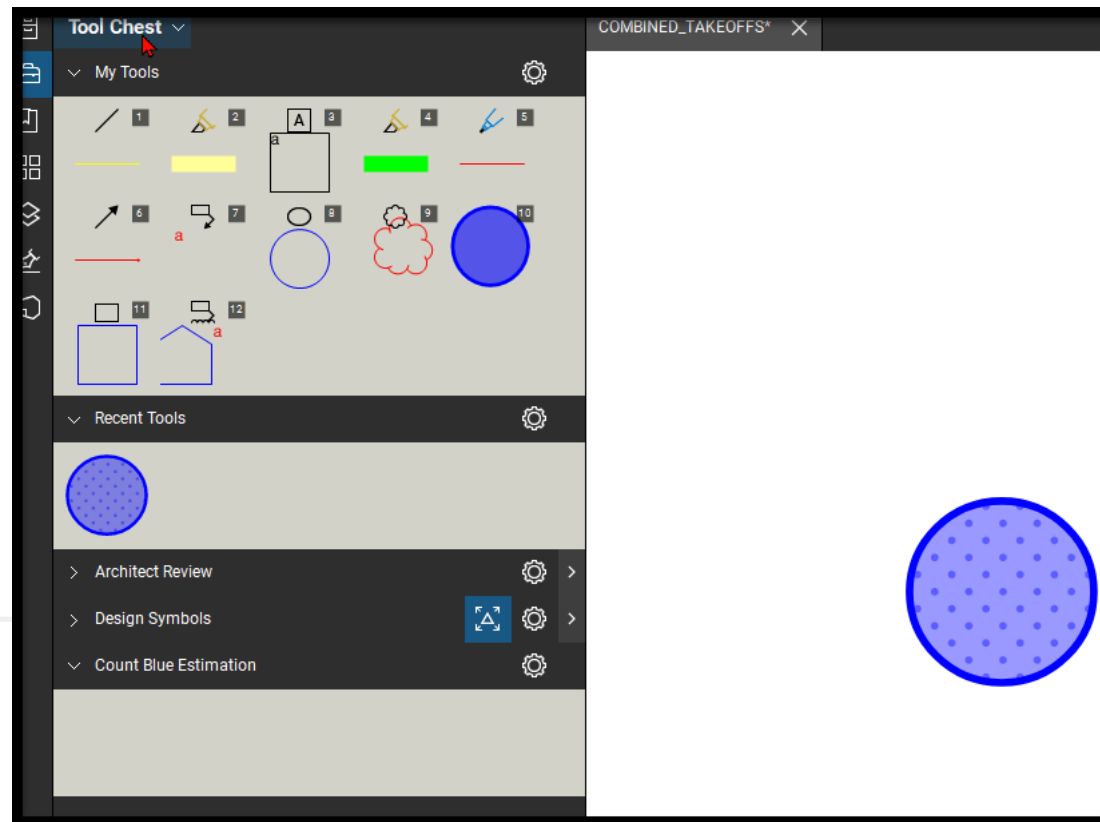
For this whitepaper I'll be creating a tool set called *Count Blue Estimation*.



Create Custom Estimation Markups

The next step is to create custom estimation markups. For this example, I'll get an itemized count for *return diffusers*. This example can be replicated for any measurement markup. For example, tile and carpet area costs, PVC lengths and so on. I always begin on an existing set to start my markup creation.

Creating a count: Create whatever symbol you want to represent your count or sequence (if it's a sequence, you need a number value added to it. Sequence also itemizes with every placement). For this example, I will be making my return diffusers as a count measurement vs. a sequence measurement.

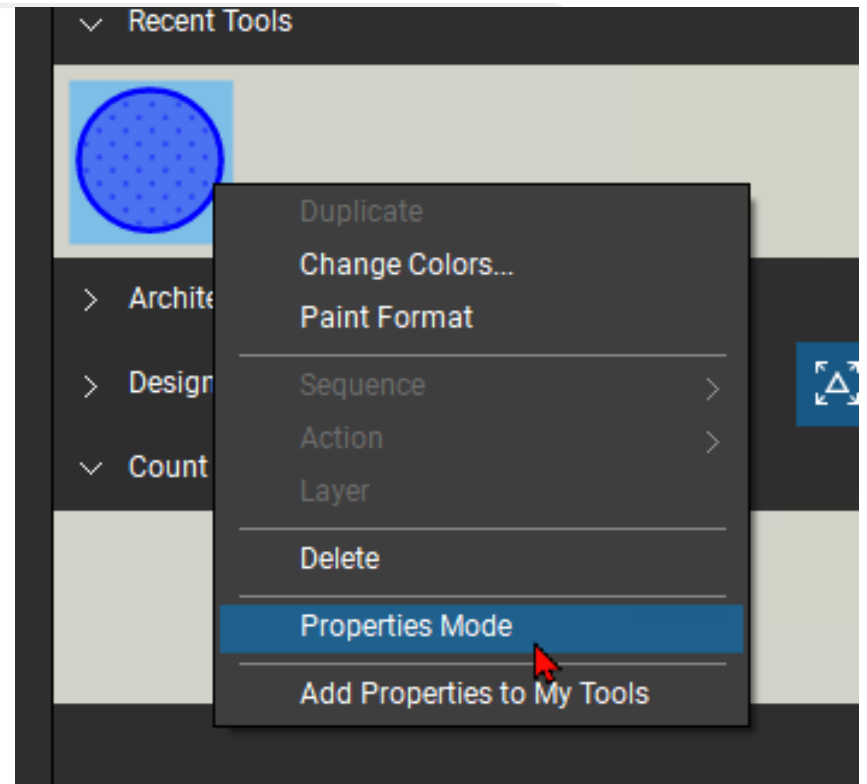


Create Custom Estimation Markups (continued)

After you've decided what your symbol will look like, the markup will be populated in your *recent tool sets*. This tool set is not permanent, and it only shows markups that have been created in the current Revu session. If you close out of Revu, all the recent markups will be cleared. There are two different modes that Revu uses in tool sets for your markups:

- Properties mode: Copies the properties of the command, allowing you to use the same command with the same properties you've set.
- Drawing mode: Exact copy of the markup.

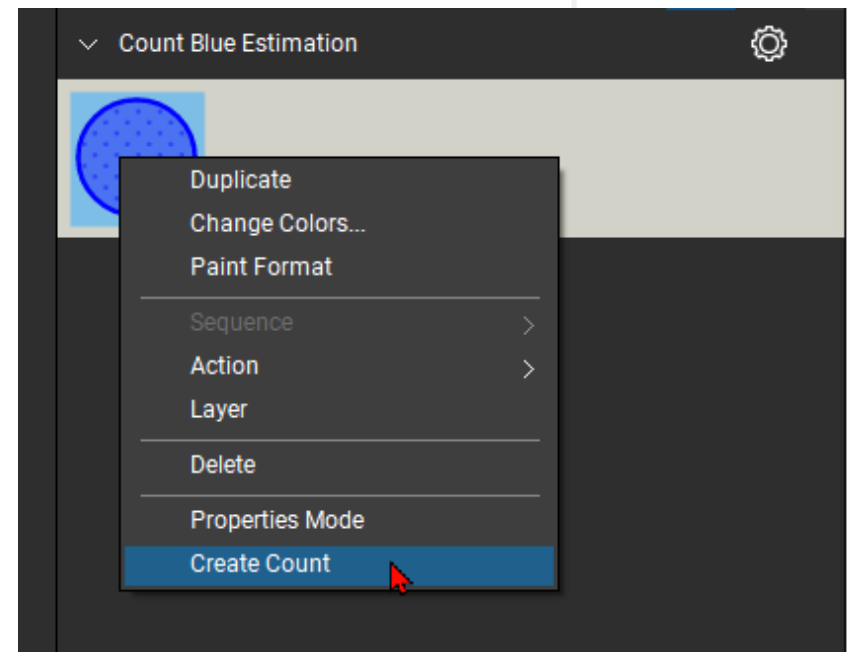
You can switch between either mode by double-clicking on the markup or right-clicking and selecting the other available mode.



Create Custom Estimation Markups (continued)

Once you have changed the markup to properties mode, you can drag the markup from the recent tool set to any other tool set. For this example, I will drag it into the *Count Blue Estimation tool set*. You can also add it from the PDF by *right-clicking on the markup > add to tool set > select the destination*.

Now that you've added it to your tool set, you can change it into a count by right-clicking on the markup in the tool set and selecting *create count*.

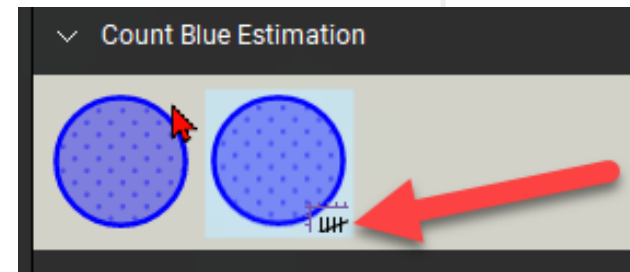


Create Custom Estimation Markups (continued)

An exact copy of the markup will be created with a measurement icon below it; the metadata DOES NOT transfer; therefore, I wait for the markup to change to a count and then add any metadata to the newly created markup.

Once you've removed the old markup, select the markup from the tool set and modify its metadata from the *dynamic options bar* or *properties panel* (I prefer the dynamic options bar).

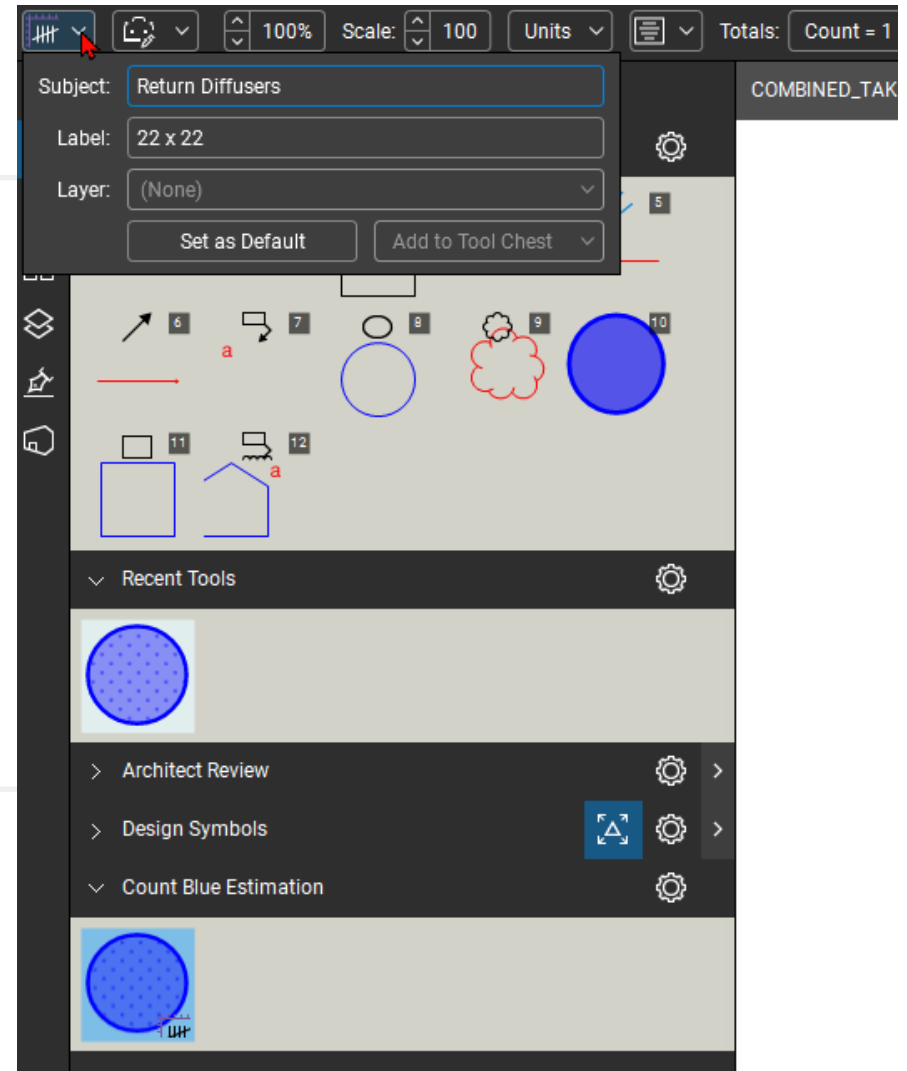
This is where you can add a subject and label to your markup (if you've created any custom columns, you will need to add the data from the properties panel). We will circle back to associating a cost once we learn how to create custom columns.




Create Custom Estimation Markups (continued)

Subject plays a big part in how you can organize your data in your markups list. For example, I can sort by subject "return diffusers" then see all the different sizes under the subject per label. Just remember this when creating your data and how you can leverage it in the markups list.

This is also a great time to add layers to your markups. Layers allow you to control when specific markups display, export, or even print. It's an excellent way to manage your markups globally. Be sure to check out our Morning Coffee Revu session on [how to create custom layers](#)!



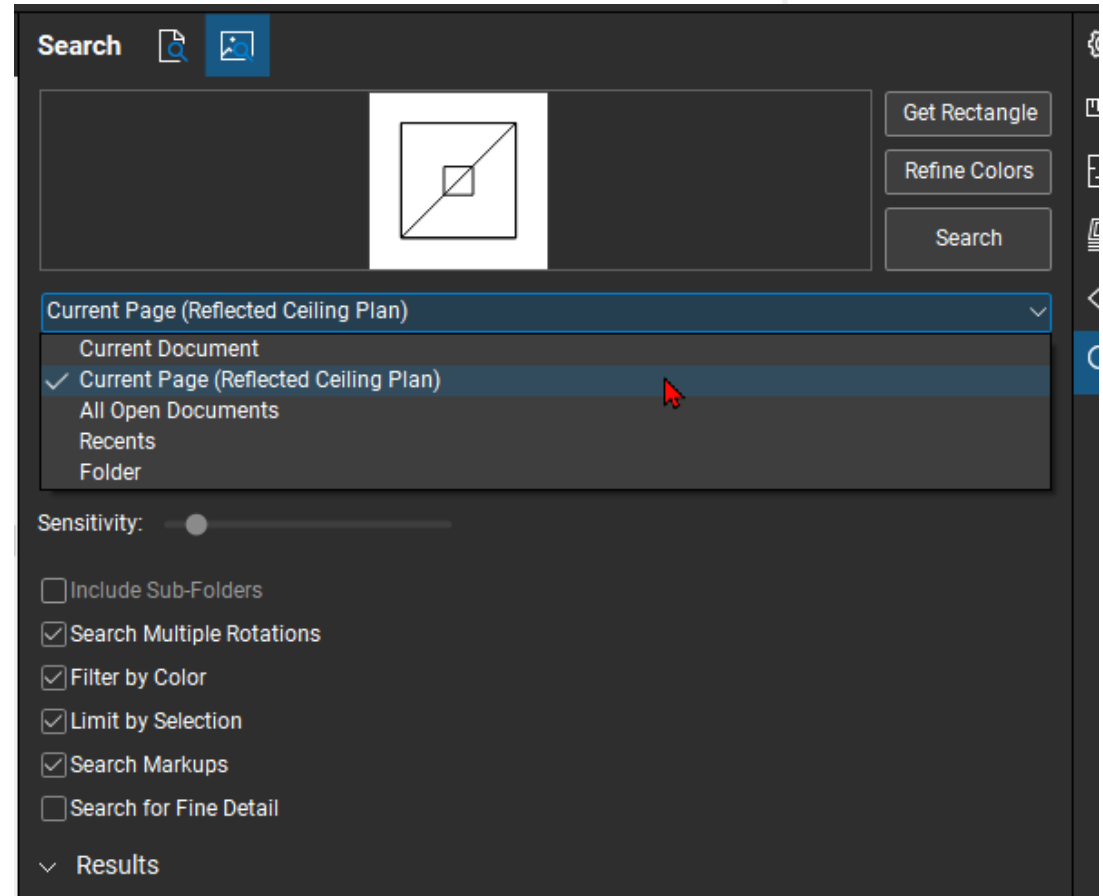
Navigate the Search Panel

Visual Search: You can always go page per page and place your count markup for each instance. This works great if you have a raster PDF and if you have a vector PDF you can automate that process. We can use the *search panel*  to search by text and visual search. With visual search on a vector PDF, we can encompass a symbol on the PDF set and have Revu search for us.

Select the *visual search icon*



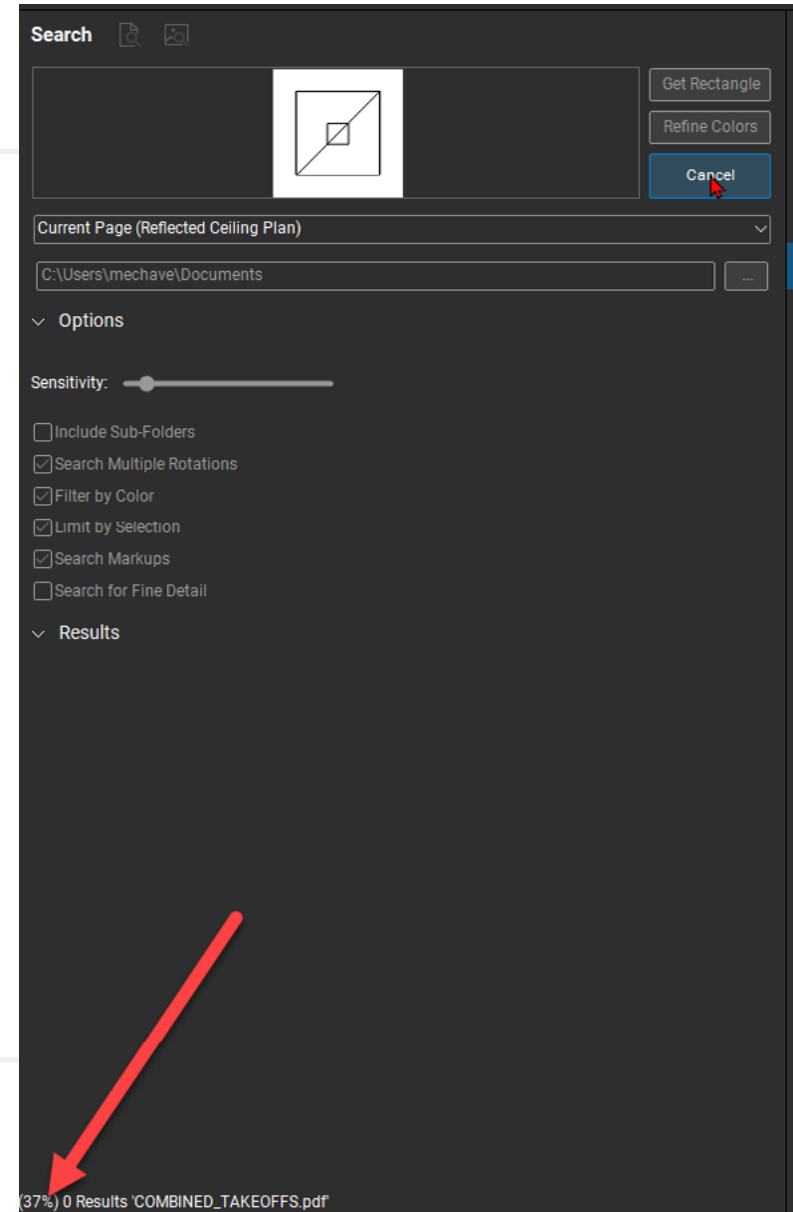
From there you'll be given some options. First, select *get rectangle* then encompass the symbol you want to search for. In this example, we will have Revu search for all our return diffusers. Below you can search per page, current document, folder and more.



Navigate the Search Panel (continued)

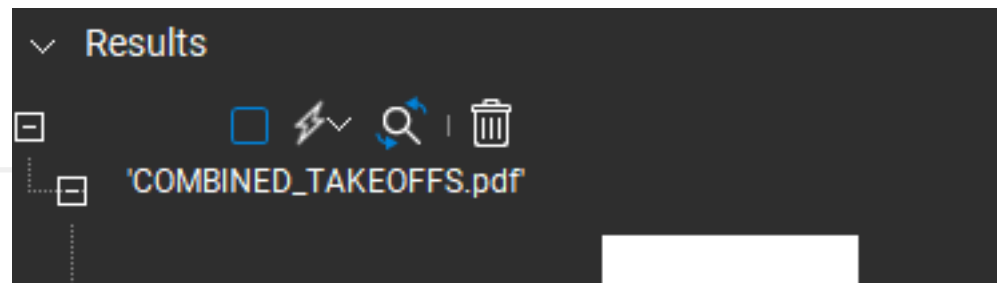
Below the dropdown is a sensitivity bar you can use to change the way Revu will search for the content you have selected. For even more refinement in your search, use the checkboxes. Once you're done with all your settings, select *search*.

Once you search, you will see the percentage of completion in the lower left corner.



Navigate the Search Panel (continued)

When your results are done, you will have some options indicated with a square, thunderbolt and magnifying glass.

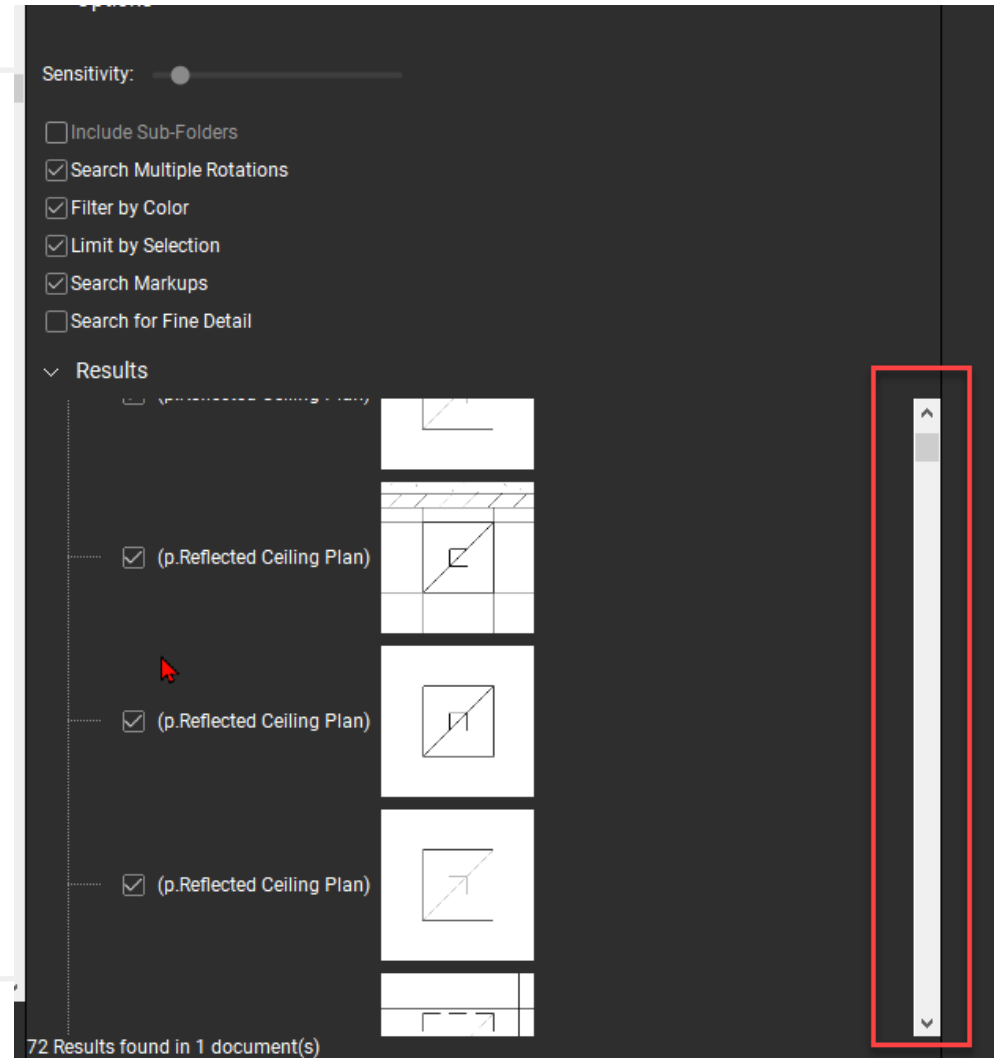


The square is for selecting all, and the thunderbolt allows you to place all the following:

- Hyperlink
- Mark for redaction
- Apply a count measurement from your tool sets

Navigate the Search Panel (continued)

You can scroll through all your selections from what Revu found. I usually select all, scroll through and verify that the proper symbol is selected, then deselect all that were not my intended selection.




Navigate the Search Panel (continued)


Once complete, you can apply your custom count from your newly created tool set to everything you've selected.

The screenshot shows a software interface with a search panel on the left and a context menu on the right. The search panel has a search bar at the top with the text "Find Subject or Label". Below it are three sections: "Built-in" with five red icons (checkmark, triangle, square, circle, diamond); "Architect Review" with a table of search results; and "Count Blue Estimation" with another table of search results. The context menu is open over the search results, showing options like "Hyperlink Checked", "Mark for Redaction", "Apply Count Measurement to Checked", "Highlight Checked", "Underline Checked", "Squiggly Checked", and "Strikethrough Checked".

Architect Review


Subject	Label
 Count Measurement	

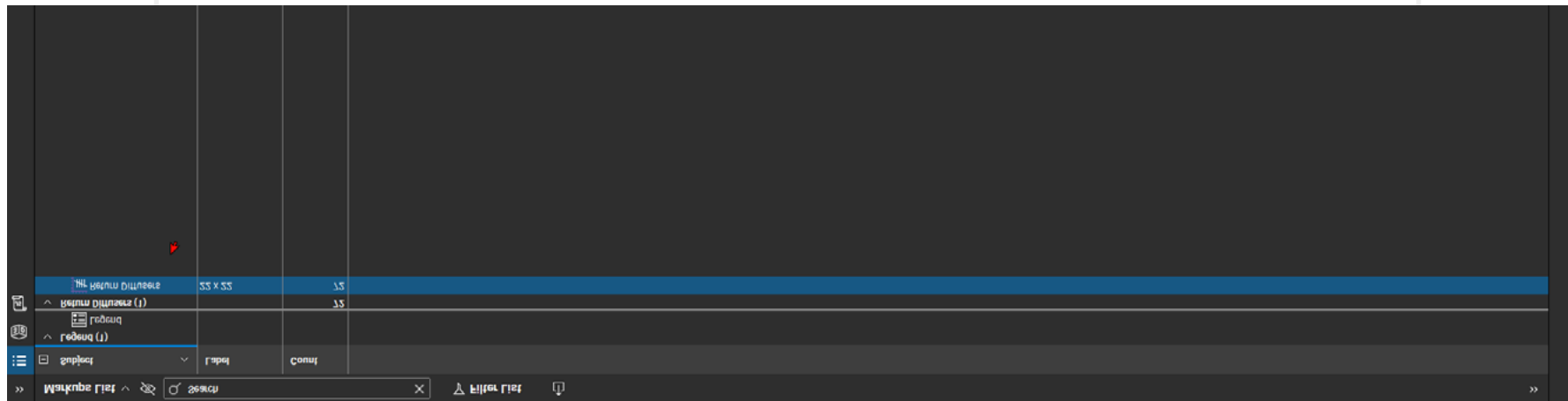
Count Blue Estimation

Subject	Label
 Return Diffusers	22 x 22

7/2 Results found in 1 document(s)

Customize Columns

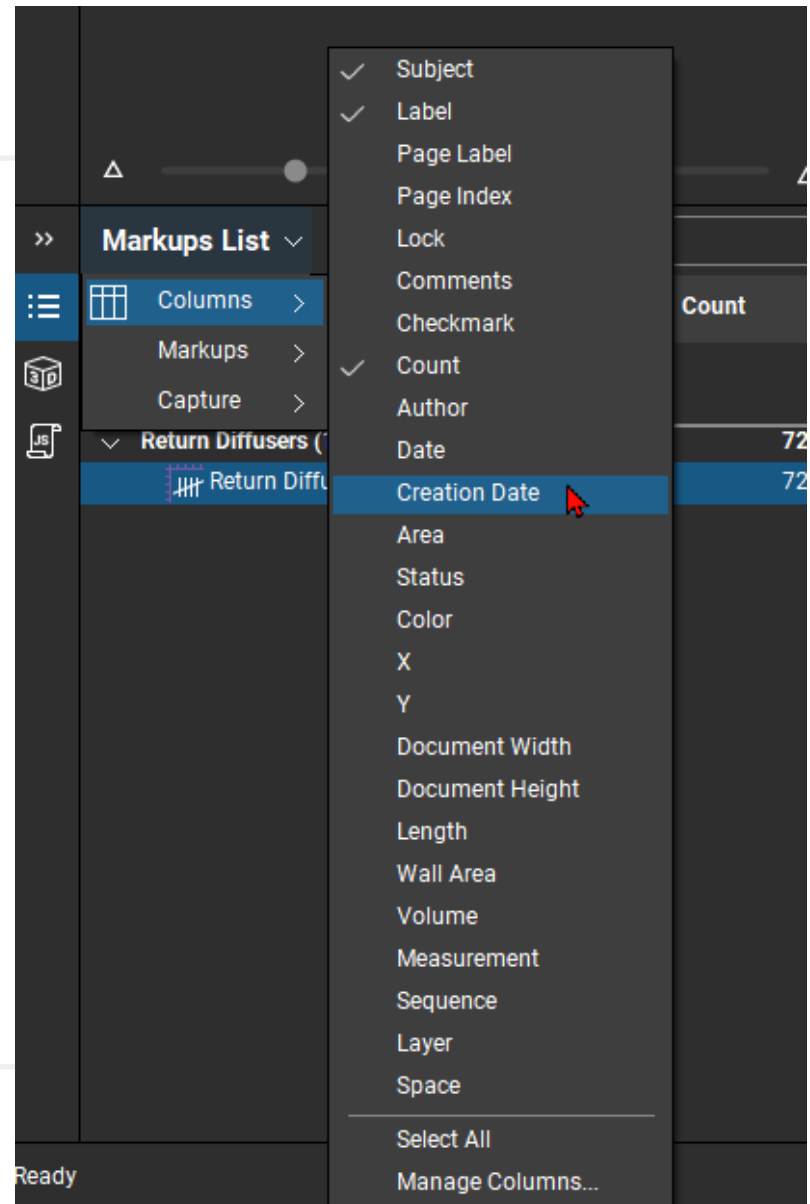
Now that you've placed your count measurement, we can move on to your *markups list panel* . By default, you can find this panel in the lower left corner of your user interface or ALT+L. Once you've selected the panel, a list of all your markups and their associated metadata will populate for your current document.



To add or remove default columns of data, you can select the *markups list drop down* > *columns*. Left click on what you want to populate data for. A checkmark will indicate that it's visible.

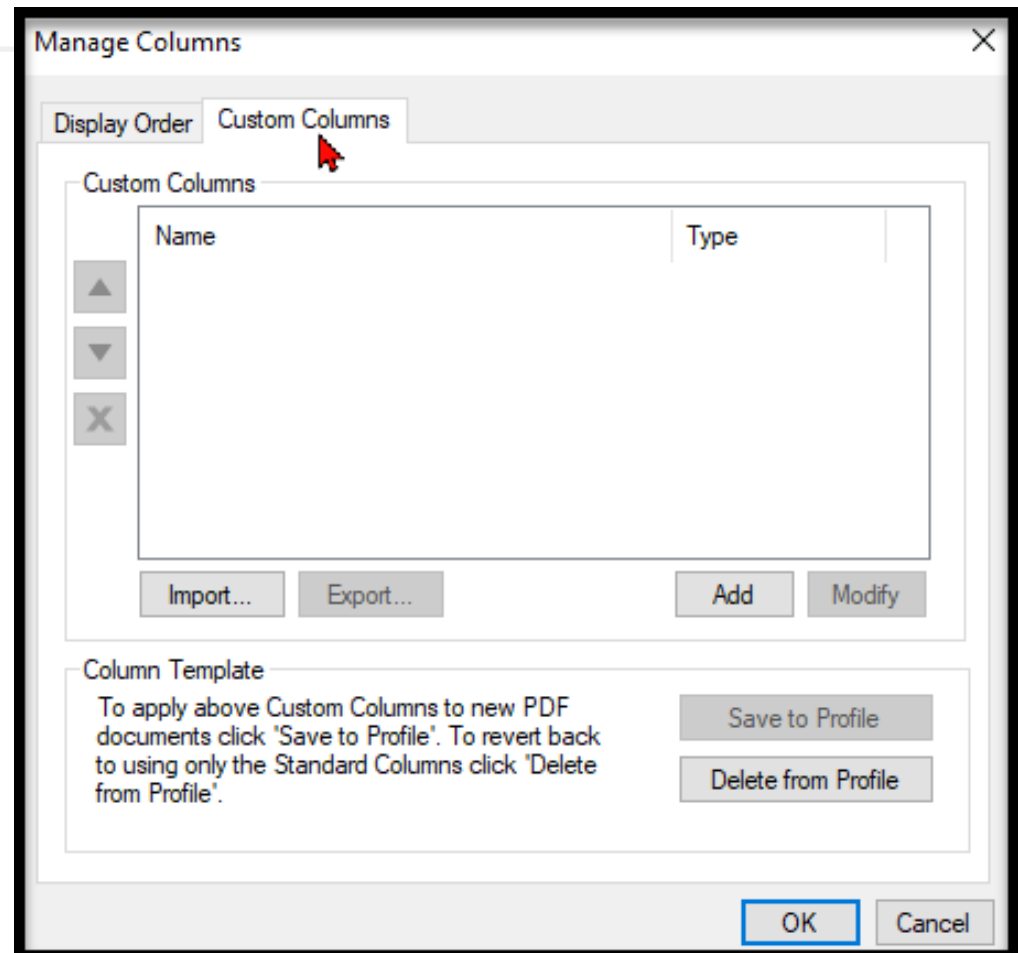
Customize Columns (continued)

If you want a custom column such as cost and total cost, you can select *manage columns* at the bottom of the list. Once selected, move over to the *custom columns* tab. This is where you can add all the custom columns you'd like. If you'd like more info on how custom columns or markups list work, check out this video on [navigating a Bluebeam markups list](#).



Customize Columns (continued)

Now that we have all our data, we can export this data out as a CSV or XML file. To learn how to do this, check out [this Morning Coffee Revu session!](#)



conclusion:

We covered a lot of ground in this whitepaper, including how to create a custom profile, tool set and markup, and how to navigate the search panel and your markups list. Now you should have a better outlook on how you can use one solution for your on-screen takeoff. Don't forget to [grab your FREE Revu profile](#), Count Blue, via Bluebeam Studio!

As always, if you have any questions about what was covered in this whitepaper [contact us](#) or join our Bluebeam certified trainers every Tuesday during [Morning Coffee Revu](#).



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Michael is a dedicated technical specialist assisting the AEC Industry with over six 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 of Applied Science with an emphasis in Computer Aided Design. Michael has worked with Engineers and Architects to create construction documents for projects, including Commercial, Industrial, Residential and Structural.

He has experience with mechanical fabrication drawings and production sets. Michael also enjoys giving back - he won a design competition with Habitat for Humanity, and he teaches his fellow industry colleagues how to become more efficient in BIM to make the software work for them, rather than against them.



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