

**B** AUTODESK®  
BIM 360™

# Project Controls



 AUTODESK.

# Introduction

One project can generate hundreds, or even thousands, of RFIs and submittal and document issuances, so making sure you have a streamlined process for managing this information is critical! With a single cloud-based platform, project teams have access to the right information at the right time. With BIM 360 teams can create, manage, distribute, and approve RFIs and submittals with project controls and activity tracking.

The following guide introduces the BIM 360 suggested project controls workflow and gives context to the different capabilities built into the product, including step-by-step starter guides.

## Autodesk BIM 360

BIM 360 improves the process of construction by supporting informed decision making throughout the project lifecycle. It does this by centralizing all project data in a single data repository and connecting project stakeholders and workflows—from design to construction to operations, from the field to the office and back.

Visit BIM 360 Site 

*Please note that the capabilities outlined in this guide are reflective as of January 2019 and will continue to undergo improvements. Additionally, some capabilities are only available in certain countries. For more information on product updates and capabilities please visit the [BIM 360 Product Release Notes](#).*



# Table of Contents

## 1 Suggested Workflows

- RFI
- Submittal

## 2 Project Controls Capabilities

- RFI Management
- Submittal Management

## 3 Additional Capabilities

- Insight & Reporting
- Project Home
- Mobile Access
- Account Admin
- Integration Partners



# Suggested Workflows

# RFI Workflow

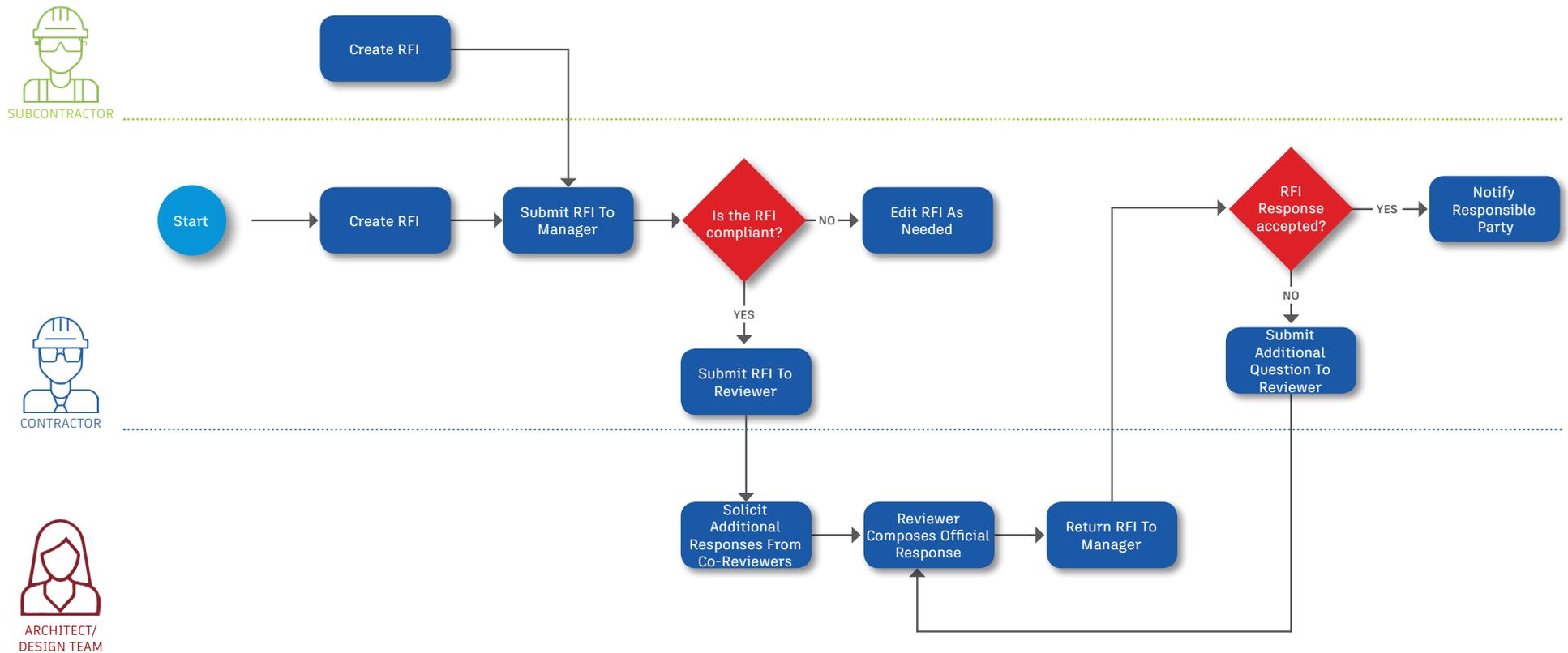
Simplify the RFI process by creating a standardized workflow that maintains transparency for the entire team. The graphic below outlines the suggested RFI workflow using BIM 360.

## Why follow this workflow?

- Easily track and review project RFIs
- Control the reviewer and approver permissions
- Allow team members to create RFIs both on a mobile device from the field or from a desktop

## BIM 360 capabilities used

- RFI management



# Submittal Workflow

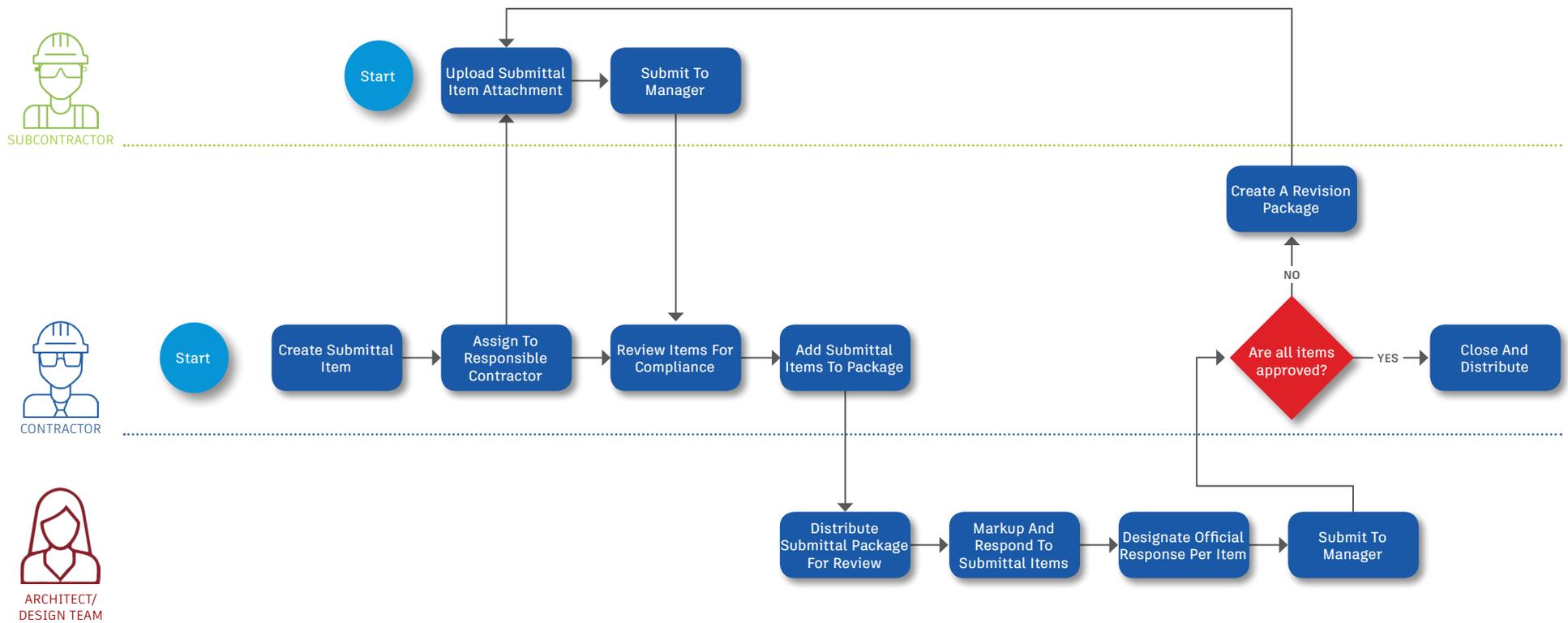
Create submittals packages, track the flow of approval processes, and manage all information in a single document library. The graphic below outlines the suggested submittal workflow using BIM 360.

## Why follow this workflow?

- Easily package all submittal items into a single submittal package
- Track and review the status of submittals
- Distribute and control reviewer privileges

## BIM 360 capabilities used

- Submittal management



# Project Controls Capabilities

# RFI Management

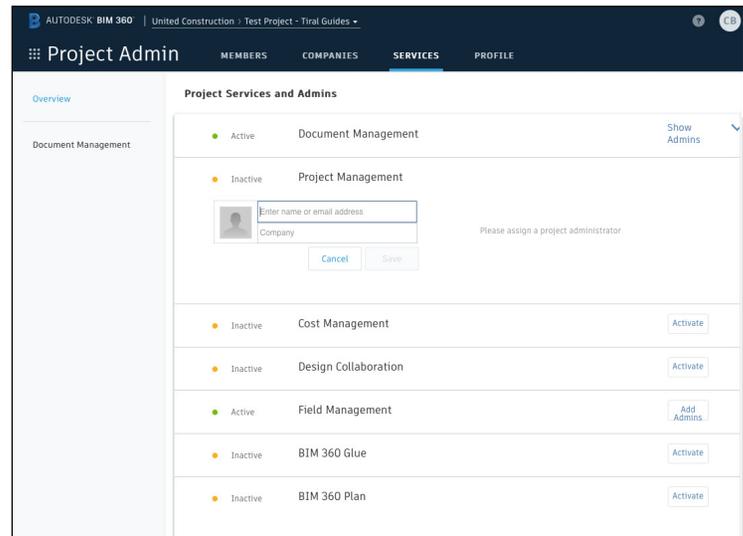
Enhance your RFI workflow by automatically posting RFIs to 2D documents and 3D models. Create accountability by designating “roles” to keep the process moving. Initiate requests and manage reviews and approvals from any device. And by publishing and storing this information in a single cloud-based repository, you can maintain a full audit trail.



## 1

### Activate the Project Management module

- A project admin needs to activate the Project Management module.
- Click the module selector for Project Admin, select the Services tab, and click “Overview” in the left sidebar.
- In the Project Management row select “Activate” and designate at least one project admin.

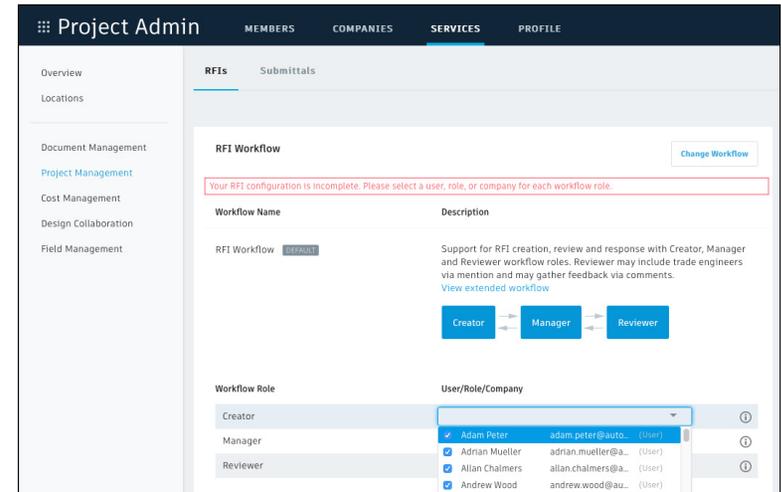


# RFI Management

## 2 Setting up the RFI workflow

- In the Project Admin module, select the Services tab.
- On the left sidebar, click “Project Management” then “RFIs.”
- Click “Change Workflow” to select an RFI workflow. The workflow determines the RFI actions for individual project users.
- Click the drop-down list to assign user/role/company for each workflow role in order to start using RFIs.

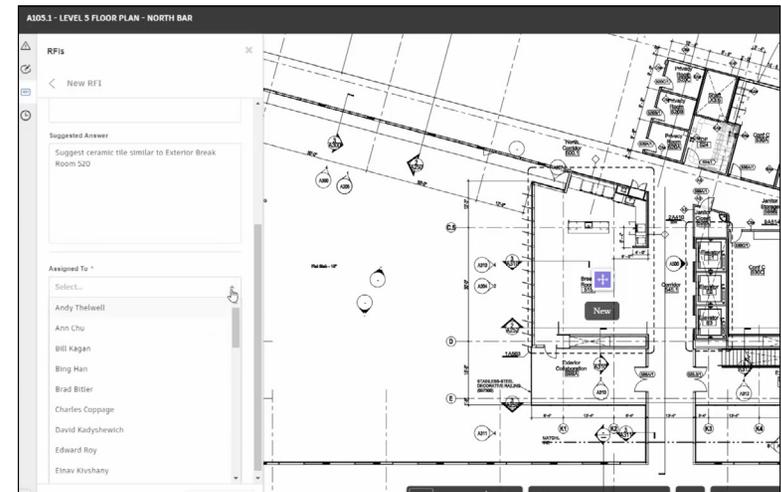
PRO TIP: You can create a project-level RFI and then associate it to a document or model by using the “Linked Documents” option.



Set Up the RFI Workflow

## 3 Creating RFIs associated with a document or model

- In the Document Management module, click to open a 2D document or 3D model.
- In the RFI panel, select “Create RFI.” Click where you want to place the RFI and an RFI pushpin will appear.
- Enter a title and complete all necessary fields. By default, the RFI status will be set to Draft. When ready to assign, set to Open.
- Note: Any members selected as a co-reviewer can add comments, markups, and attachments. Those chosen for the distribution list will be aware of the RFI but are not expected to comment.



Creating RFIs

# RFI Management

## 4 Creating project-level RFIs

- Project-level RFIs are RFIs not associated with a document or model.
- In the Project Management module, select the RFIs tab and click “Create RFI.”
- Once the “Add New RFI” box opens, enter a title and complete all necessary fields. By default, the RFI status will be set to Draft. When ready to assign, set to Open.
- Note: A member selected as a co-reviewer can add comments, markups, and attachments. Those chosen for the distribution list will be aware of the RFI but are not expected to comment.

PRO TIP: You can create a project-level RFI and then associate it to a document or model by using the “Linked Documents” option.

The screenshot shows the 'Add New RFI' dialog box. It has a 'Status' dropdown menu set to 'Draft'. The 'Title' field contains 'Flooring transition detail at lobby'. The 'Question' field contains 'Please provide the flooring transition detail at the lobby.' The 'Suggested Answer' field is empty. There is an 'Attachments' section with a dashed border and a 'browse' link. At the bottom, there are 'Create another', 'Cancel', and 'Create' buttons.

## 5 View/edit/submit RFIs

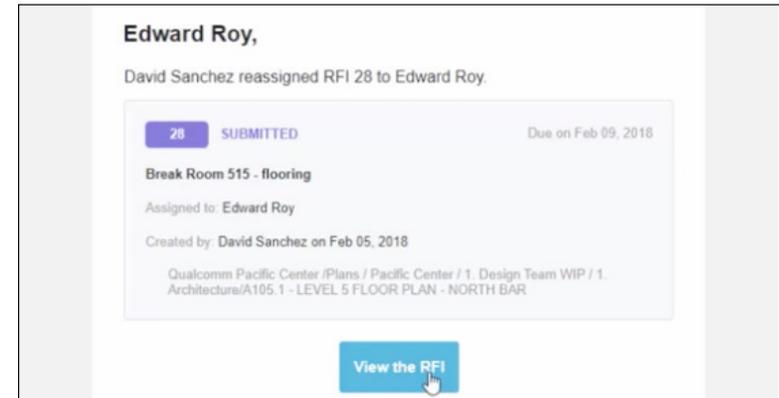
- View all project-level RFIs in the RFIs tab. Click to open the RFI and use the pencil icon to edit any necessary fields.
- For document or model-based RFIs, under “Details” click the document hyperlinks to open the associated document. Or when viewing a document or model use the RFI panel to navigate to the RFIs.

The screenshot shows the details view for RFI #8. The status is 'SUBMITTED'. The 'DETAILS' tab is active, showing the 'Question' 'What is the color of the flooring in this room?'. The 'Suggested Answer' is 'Add suggested answer'. The 'Assigned to' field is 'Bill Kagan (United Construction), Kevin Ellis (Autodesk)'. The 'Location' is 'Conference Room 311'. The 'Due Date' is 'Unspecified'. The 'Document' is 'Unspecified'. The 'Distribution list' is 'Unspecified'.

# RFI Management

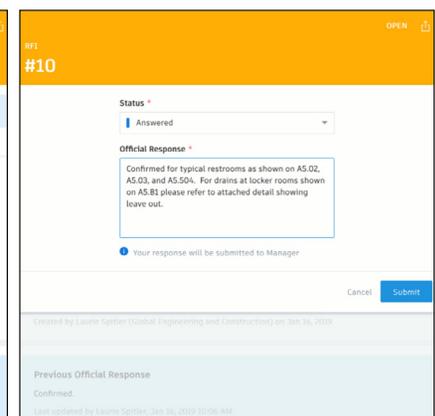
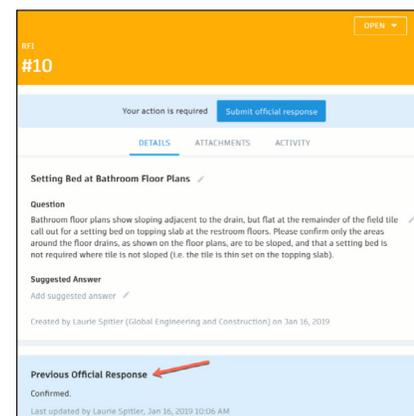
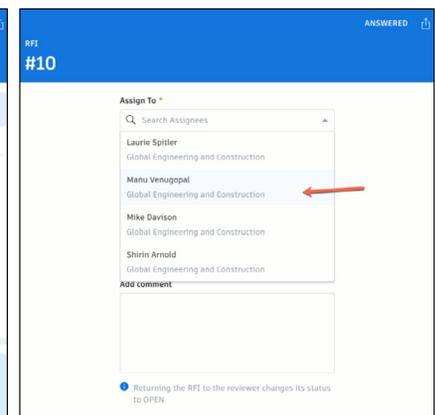
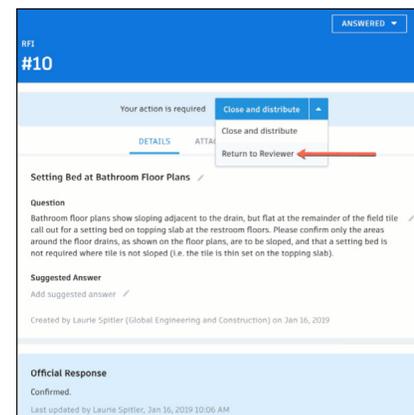
## 6 Review & respond to RFIs

- Depending on where you are in the RFI workflow, the relevant assignee will receive an email notification.
- Open the email and select “View the RFI.” You will be directed to the RFI and associated documents.
- The reviewer can add additional co-reviewers, comment, attach documents, and submit the official response.
- You can also review and respond to RFIs using the RFIs tab within the Project Management module.
- The RFI manager will review the response and set it to closed.



## 7 Re-open answered RFI

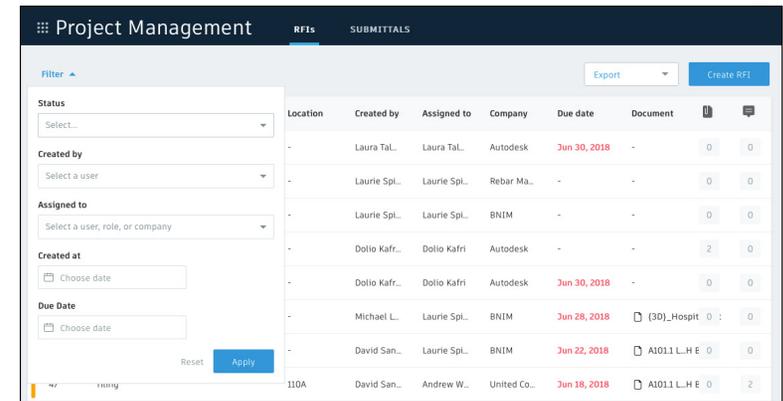
- Re-open RFI is intended as an administrative override to revert an RFI to the Reviewer’s court if the answer is incomplete in some way. It is not intended to act as a revision process.
- When an RFI Manager receives a response that is incomplete, they have the option to Return to Reviewer. Use the drop down to select “Return to Reviewer.”
- Select who to assign the RFI to. The Reviewer will see the RFI back in their court, and will be able to view the previous official response and select “submit official response” to send a new response to the Manager.



# RFI Management

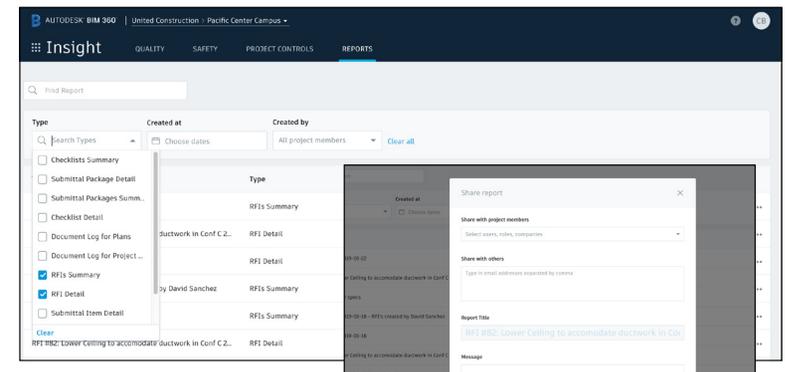
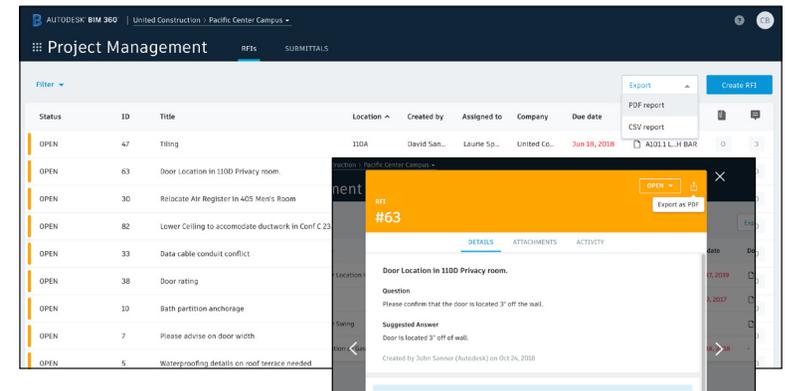
## 8 Filter and sort

- On a mobile device, tap “RFI” then use the filter option to filter by status, assignee, or due date.
- On a computer select the Project Management module then the RFIs tab to filter with the drop-down lists or sort by clicking the column headers.
- You can also filter and sort directly from a document or model-based RFI via the RFI panel.



## 9 Exporting reports

- On a computer select the Project Management module then the RFIs tab.
- To export a summary report of all RFIs click the “Export” drop down list. You can optionally edit the report title and add a message. Select “Create Report” and the report will be emailed to you.
- To export a detail report of an individual RFI select to open the RFI. Then click the folder icon in the top right corner. The report will be emailed to you.
- You can also export directly from a document or model-based RFI via the RFI panel.



**PRO TIP:** Use the reports tab in the Insight module to access all exported summary and detailed RFI reports. You can filter the reports by type, creation date, and creator in order to quickly find the report you need.

You can download the report or share it with team members by clicking the three dot icon.

# Submittal Management

Submittals are an essential part of any construction project, and effectively organizing and managing your submittals is vital. With the Submittal workflow, you can efficiently create, coordinate, and manage all submittals in a single document library anytime. Initiate requests, manage reviews and approvals, and sync critical information to mobile devices for offline use.

## 1 Identifying submittal manager

- To identify a submittal manager the Project Management module needs to be activated.
- In the Project Admin module, select the Services tab.
- On the left sidebar, click “Project Management” then “Submittals.”
- Enter member, company, or role to act as manager.

Add a Submittal  
Manager



**Project Admin** MEMBERS COMPANIES SERVICES PROFILE

Overview  
Locations  
Document Management  
Project Management  
Cost Management  
Design Collaboration  
Field Management

RFIs **Submittals**

**Manager**  
The Submittal Manager has sole permissions to submit packages for review, and close them.

Select... **Add**

Member	Role	Remove
Wes Newman	Architect	Remove
Zohar Liran	Architect	Remove
Manu Venugopal	Member	Remove

Manu Venugopal Member manu.venugopal@autodesk.com Remove

# Submittal Management

## 2 Creating submittal items (submittal manager)

- In the Project Management module, select the Submittals tab.
- You can import submittal items using the import button or select “Create new item.”
- Enter all necessary information, including:
  - **Spec Section:** Select a spec section or create a new one. For example, furnishings, equipment, finishes.
  - **Title:** Enter a descriptive title to identify the item.
  - **Type:** Select a type, for example, samples or product data.
  - **Assign to Responsible Contractor:** Select the responsible subcontractor.

Creating Submittal Items

Importing Submittal Items

## 3 Creating submittal packages (submittal manager)

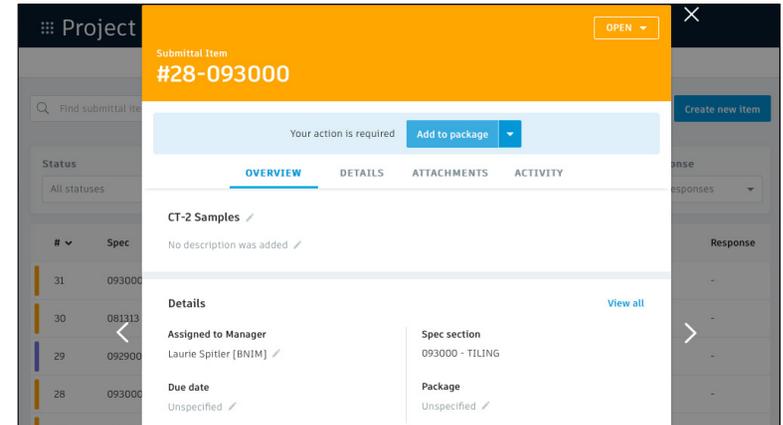
- You can create a submittal package from an open submittal item or in the “Submittals” tab under “Packages.”
- Select “Create new package.” Complete the required fields and select one or more reviewers (architect) and co-reviewers/distribution list (engineers, consultants, stakeholders, etc.).

Creating Submittal Packages

# Submittal Management

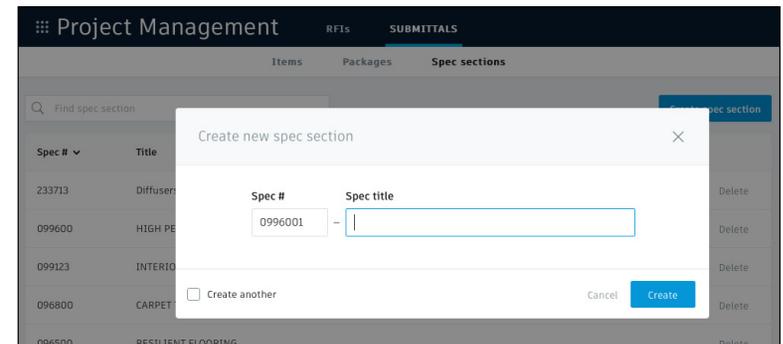
## 4 Adding submittal items to package (submittal manager)

- In the Submittals tab under Item, select a submittal then “Add to package.”
- Select an existing package or choose “Create submittal package” to create a new package.



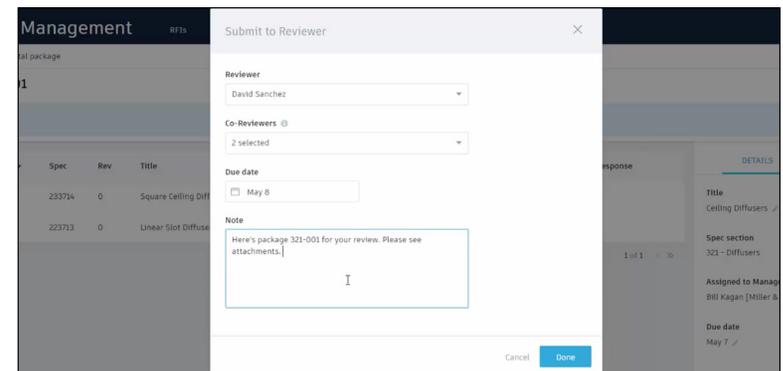
## 5 Creating spec sections (Submittal manager)

- In the Submittals tab, select “Spec Section” then “Create spec section.”
- Enter the spec number and title, then click “Create.”
- Note, you can create a spec section when entering a new submittal item by clicking “Create New” above the “Spec Section” drop-down list.



## 6 Submitting packages for review (submittal manager)

- Open the package you want to submit and select “Submit to Reviewer.”
- Select the reviewer, add co-reviewers, due date and notes if needed.

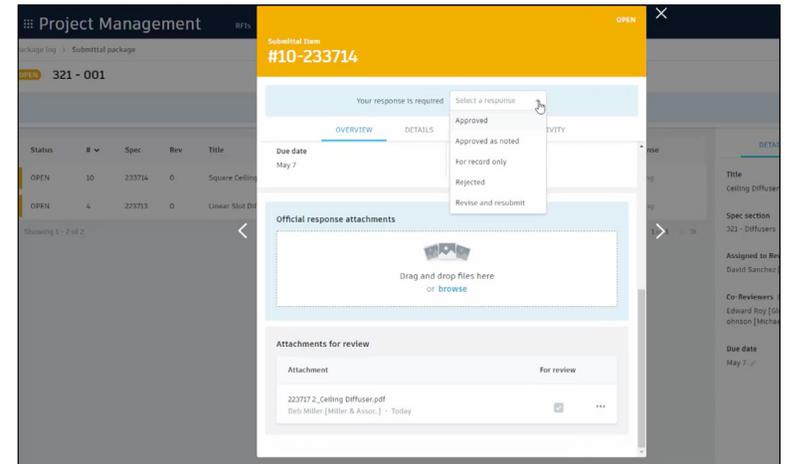


# Submittal Management

7

## Reviewing submittal items (reviewer)

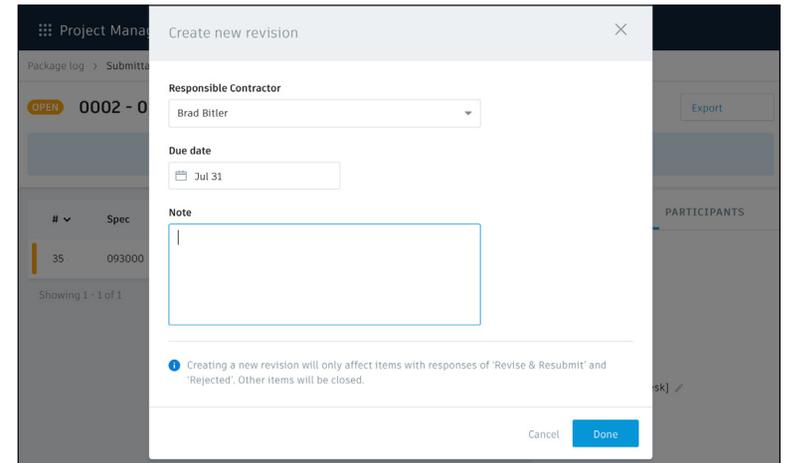
- Click to open the item(s) for review within “Attachments.”
- Designate office response using the drop-down list next to “Your response is required.”
- Upload any official response attachments and submit back to the manager.



8

## Creating a revision package (submittal manager)

- If a reviewer responds to a submittal item with “Revise and Resubmit” or “Rejected,” the manager needs to create a revision.
- Open the submittal package and select “Create new revision.”
- Include the responsible contractor, due date, and notes.
- Note: Creating a new revision will only affect items with responses of “Revise & Resubmit” and “Rejected.” All other items will be closed.



# Submittal Management

9

## Responding to a revision package (responsible contractor)

- The contractor will be notified of the revision.
- Open the submittal, item and in “Attachments” upload the revised documents.
- Once attached, the document will appear with the “For review” box checked.
- Close and select “Submit to Manager.”
- The manager can now send the revised item(s) to the reviewer.

Project Management RFI's SUBMITTALS

Package log > Submittal package

**OPEN** 096800 - 001 Export

Your action is required Create new revision

#	Spec	Rev	Title	Type	Response
14	096800	0	Warranty	Warranty/...	Revise and r...

Showing 1 - 1 of 1 << >> 1 of 1 >>

**DETAILS** PARTICIPANTS

**Title**  
Moisture Test ✓

**Spec section**  
096800 - CARPET TILE

**Assigned to Manager**  
Bill Kagan [United Construction] ✓

**Due date**  
Unspecified ✓

10

## Closing submittal packages (submittal manager)

- Once the package is approved by the reviewer, the submittal manager needs to close it and distribute it to the responsible contractor.
- In the Submittals tab under “Packages,” open the package and select “Close and Distribute.”
- Include the responsible contractor and in the distribution list identify team members who should be aware of the closed submittal package.

Project Management RFI's SUBMITTALS

Package log > Submittal package

**OPEN** 096800 - 002 Rev. 1 Export

Your action is required Close and distribute

#	Spec	Rev	Title	Type	Response
12	096800	0	Slab Moisture Test Report		
11	096800	1	Shop Drawings		

Showing 1 - 2 of 2

**Close and distribute** ✕

**Responsible Contractor**  
Ben Johnson

**Distribution list** ⓘ  
3 selected

**Note**

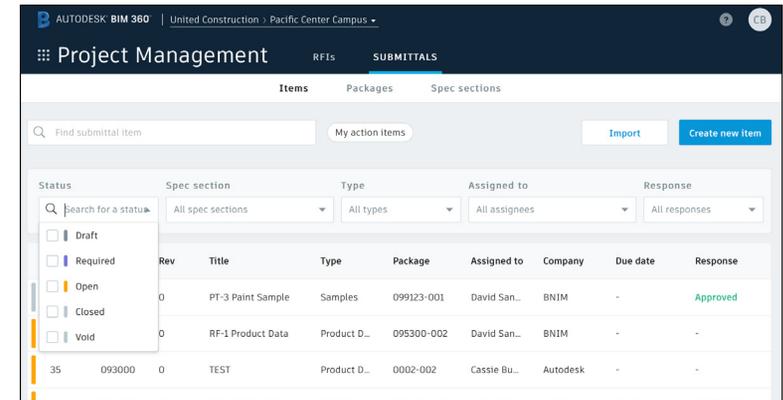
After closing, the package will be assigned to the 'Responsible Contractor' and will be available for viewing to all project members.

Cancel Done

# Submittal Management

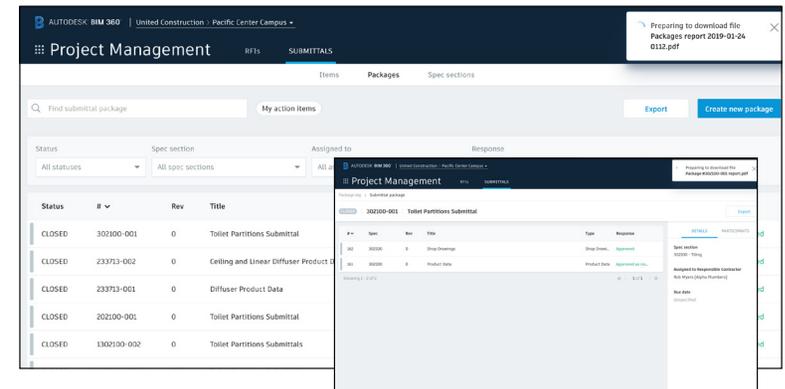
## 11 Filter and sort

- You can filter and sort in the Submittals tab.
- Select either “Items,” “Packages,” or “Spec Section.”
- To filter “Items” and “Packages,” use the drop-down lists associated with each criteria. For “Spec Section” you can’t filter but you can search using the search field.
- To sort, select the column headers.



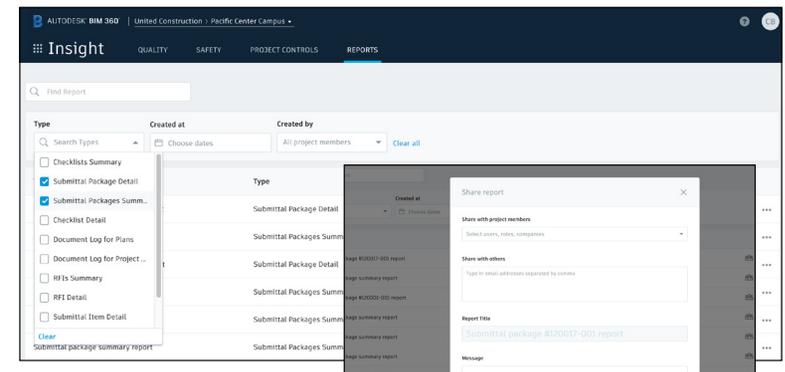
## 12 Exporting reports

- To export a summary report of all Submittal packages click the packages tab then “Export.” The report will be emailed to you.
- To export a detail report of an individual submittal package select to open the package then click “Export”. The report will be emailed to you.



PRO TIP: Use the reports tab in the Insight module to access all export-ed summary and detailed submittal reports. You can filter the reports by type, creation date, and creator in order to quickly find the report you need.

You can download the report or share it with team members by clicking the three dot icon.



# Additional Capabilities

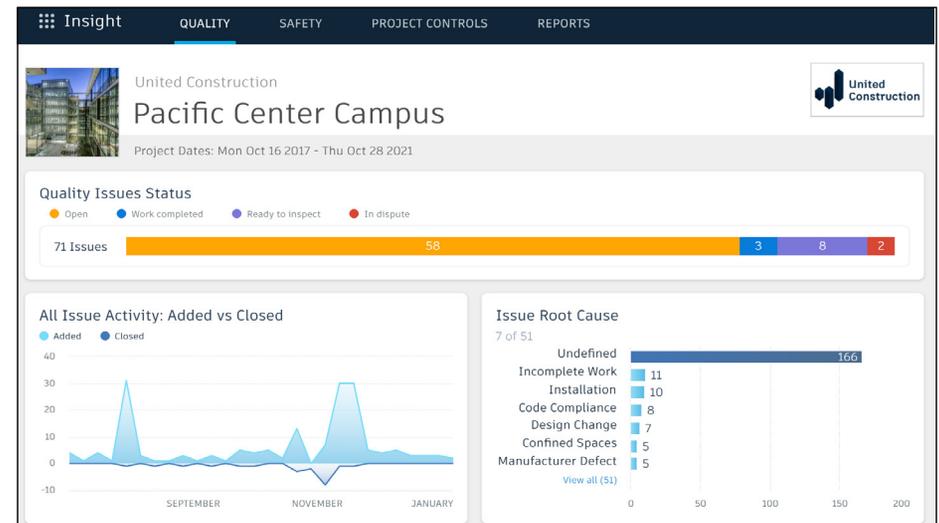
# Insight & Reporting

Having the right information at your fingertips is key to making better business decisions. With the Insight module, teams have visibility into high-level issues that might be holding up project schedules and driving up costs. By quickly seeing where issues are happening and putting the right steps in place to solve problems, teams can prioritize next steps and drive quality control needs to help ensure projects are successful.



## 1 Insight module

- Click on the Insight module from the module picker.
- There are multiple tabs for different analytics views:
  - Quality
  - Safety
  - Project Controls
- The Reports tab shows a list of exported reports related to Issues, Checklists, Documents, Submittals, and RFIs
- Use the settings gear icon to change the date range of the view.
- Use the expand arrows to get a more detailed view and metrics.



Insights Setup

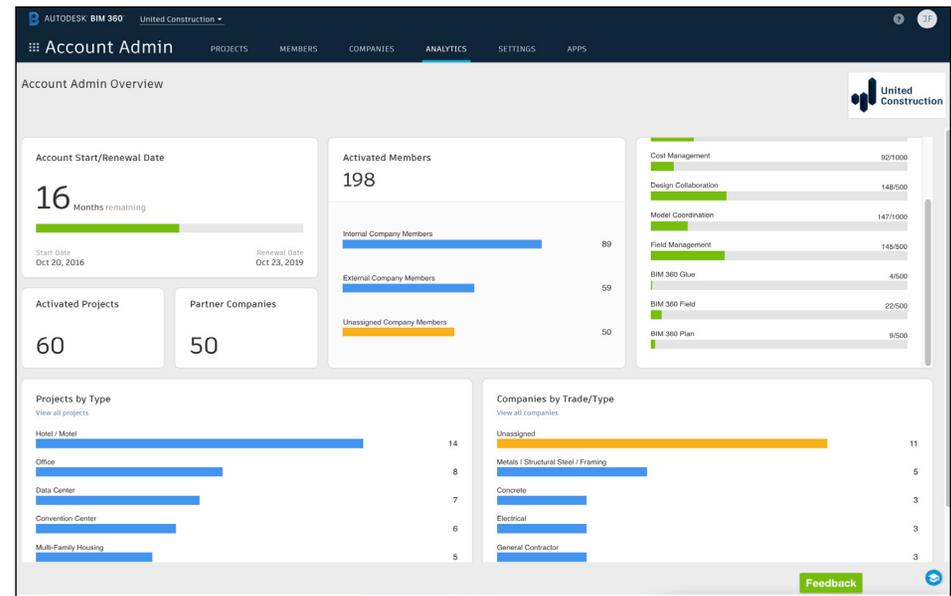


Insight Blog



## 2 Account analytics

- Click the Account Admin module in the module selector tool.
  - This option will only appear if you have admin privileges.
- Click “Analytics” to see insights on member activations, linked companies, and account information.
- Click the Members tab to see insights, member usage, and status.



Account Admin



# Project Home

Project Home is a new way of interacting with BIM 360 that gives users a single view into their entire project, with access to important, relevant, and actionable information from across BIM 360 and even some third-party services. It provides a unified experience with at-a-glance insights about the entire project, all in one place. This enables teams to quickly evaluate areas that require attention and put the necessary action in place.



## 1

## Dashboard Card Library

- Dashboard cards can be personalized by selecting “Customize” on the top left and clicking on the “Card Library”
- The Card Library gives users the ability to show information that is personalized for them including cards with data from integration partners, giving a more holistic view of the project.
- Click any of the links to drill down and get more information on a specific item.
- Use the expand arrows to open the card to full screen and minimize it.

The screenshot shows the Project Home dashboard for the Pacific Center Campus project. The dashboard includes a project address map, weather information, field issues, checklists, and RFIs.

**Project Home**  
United Construction  
Pacific Center Campus  
Project Dates: Mon Oct 16 2017 - Thu Oct 28 2021

**Project Address**  
1 Market street  
San Francisco, CA 94105

**Weather**  
60°  
Partly Cloudy Day  
Fri 61° Sat 64° Sun 68° Mon 73°  
Powered by Dark Sky

**Field Issues**

ID	Title	Due Date
5	Insulation missing	Nov 3, 2017
4	Insulation missing	Nov 4, 2017
7	Drywall defect	Nov 10, 2017
6	Drywall Defect	Nov 18, 2017
10	Issue draft	Nov 20, 2017

5 of 19 Open Issues | View all (19)

**Checklists**

Title	Location	Scheduled
Above Ceiling Inspection		Nov 4, 2017
First floor Inspection		Nov 5, 2017
Ceiling Inspection		Nov 16, 2017
Pre-drywall Inspection		Nov 18, 2017
Above Ceiling Inspection		Dec 1, 2017

5 of 46 Open Checklists | View all (46)

**RFIs**

ID	Title	Due Date
10	Bath partition anchorage	Nov 15, 2017
3	Floor specifications needed	Nov 15, 2017
14	Ceiling fixture	Nov 16, 2017
2	Wall type at exhibit storage	Nov 16, 2017
1	Mechanical pad needed	Nov 17, 2017

5 of 36 Open Issues | View all (36)

[Project Home Overview](#)

[Project Home Blog Post](#)

# Mobile Access

Construction doesn't happen behind a desk. Teams need access to project documents and project management tools anytime, anywhere. With the BIM 360 mobile app, teams can execute construction quality and safety workflows, including creating or editing checklists, viewing RFIs, adding or tracking issues, and managing or creating drawing markups, directly from an Android or iOS device.

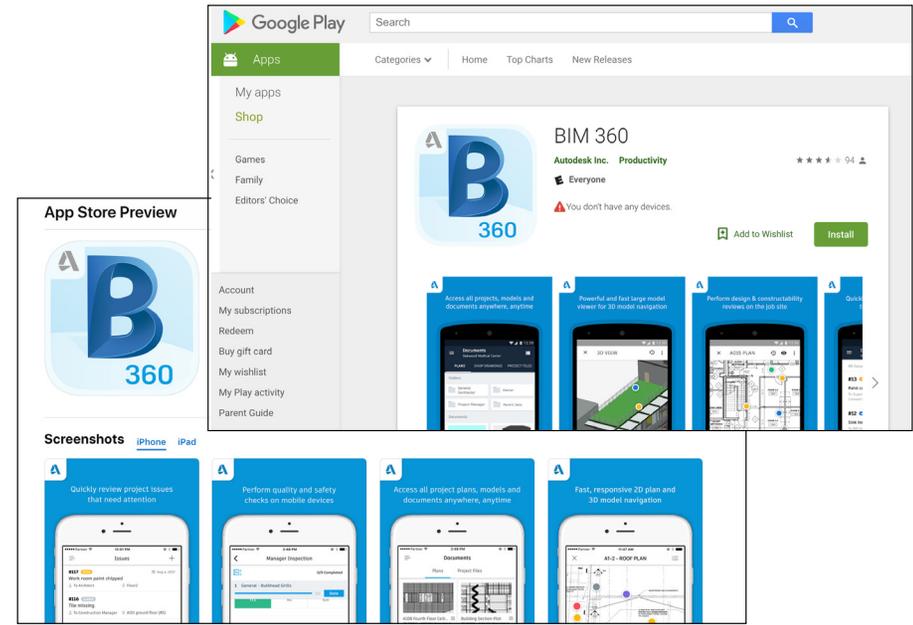


## 1 Download the BIM 360 app

- Go to the App store or Google Play store on your mobile device to download the BIM 360 app.
- The BIM 360 mobile app works with all other modules, including Document Management.

Get the iOS App 

Get the Android App 



PRO TIP: Stay up to date on mobile capabilities through the Autodesk Knowledge Network.

# Mobile Access

## 2 Mobile workflows

- Several workflow capabilities can be accomplished using the BIM 360 mobile apps, including Checklists, Issue Management, RFI Tracking, Daily Logs, and Markups.
- To see the differences in workflow capabilities for the BIM 360 and BIM 360 Docs apps, click the “BIM 360 Mobile Capabilities” link below.

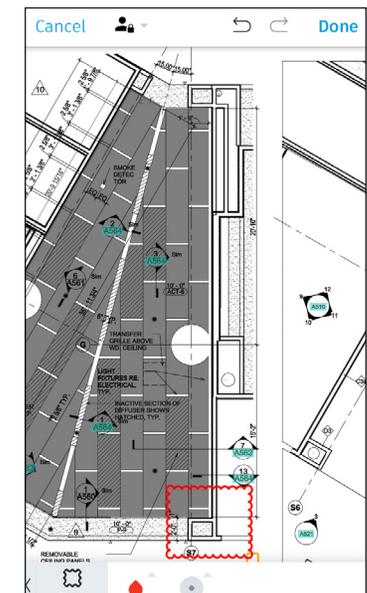
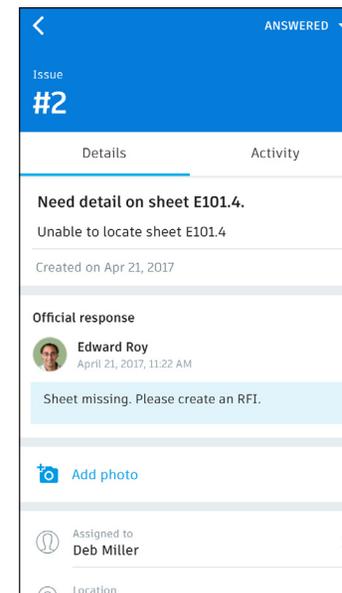
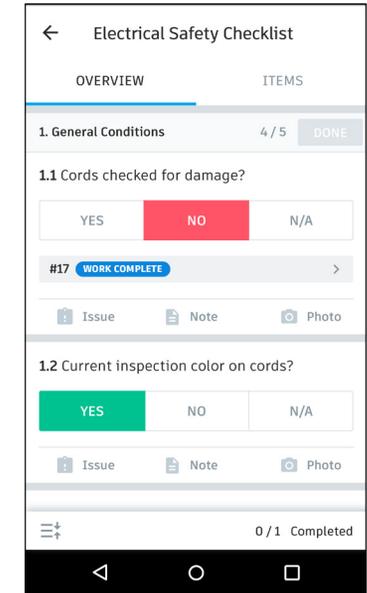
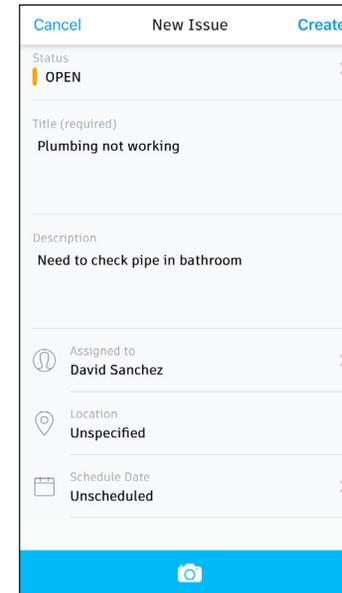
[BIM 360 Mobile Capabilities](#) 

[About the iOS App](#) 

[About the Android App](#) 

## 3 Offline sync

- Teams are able to work on-site without Internet access.
- Teams can also download individual documents and add markups and comments when working offline. Once back online, all changes will be synced back to the cloud.



# Account Admin

With the project administration tools in BIM 360, you can rest assured that your project information is in the right hands. Project admins can easily invite team members to the project and define their access levels on a project-by-project basis with a simple click. BIM 360 has two levels of administration to ensure security and control across your projects: Account admins and project admins. Only account admins can create new projects and assign additional account admins and project admins. Project admins can add and remove members, set permissions, and adjust project details.

## 1

### Create a project

- In the Account Admin module, select the Projects tab and click “Add.”
- Enter project information and click “Save & Continue.”

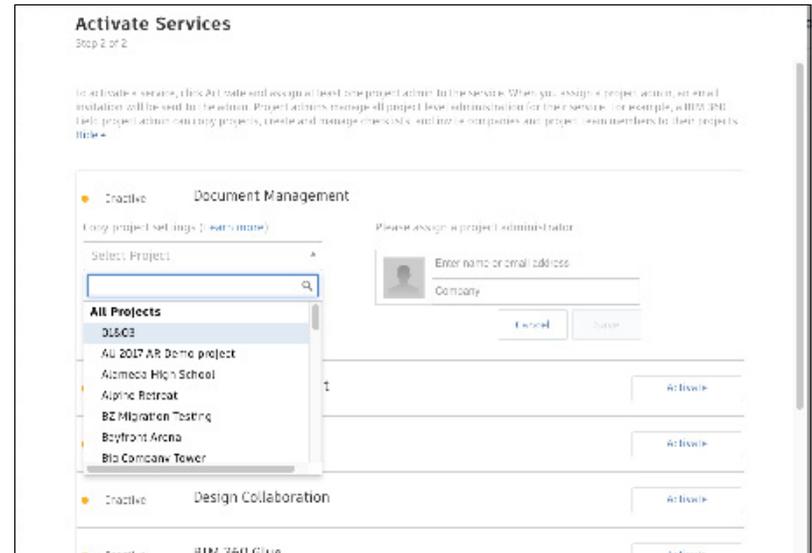
Getting Started Guide 

Create a Project 

# Account Admin

## 2 Activating modules

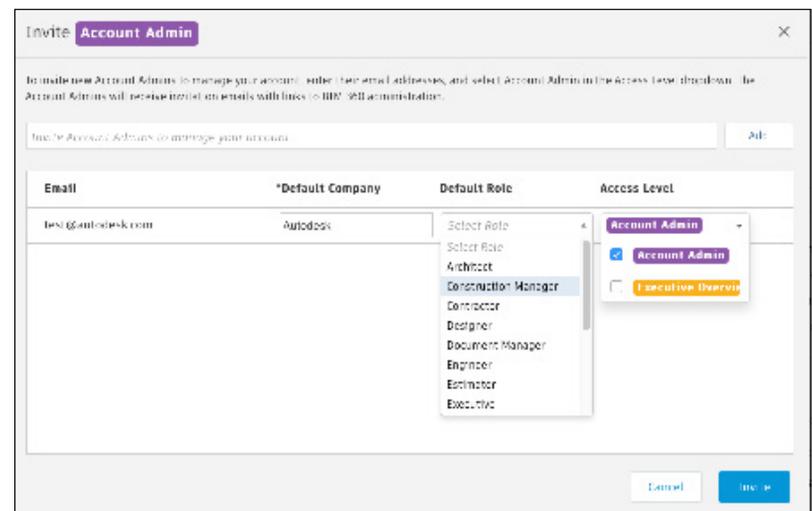
- Click “Activate” for the desired BIM 360 service.
- Assign a project admin for each service. You can add multiple admins.
- (Optional) For Document Management and Field you can copy existing project settings.
- An email invitation will be sent to the assigned project admin(s). They will need to click the link to join the project.
- Click “Finish.”



PRO TIP: You have to activate Document Management first, before you can activate other next-gen services.

## 3 Add members to directory

- In the Account Admin module select the Members tab and click “Add.”
- To add an individual member, select “Add People to the Member Directory.”
- To add an account admin, select “Invite Account Admins.”
- To import members from a list, select “Import Members by Spreadsheet.” For a first-time import, download and complete the member list template.



PRO TIP: You can change the default company and role later if necessary.

# Account Admin

## 4 Adding members to a project & assigning access levels

- In the Project Admin module, select the Members tab.
- Click “Add” and use the search bar to search the member directory.
- When you find the member, select them and click “Select.”
- Add their company and role. Note: Role determines their access level to all BIM 360 services.
- Click the icon(s) to overwrite the access level granted by their project role.
- Click “Add to Project.”
- Update existing access levels by clicking the grayed out icon(s).

The screenshot shows the 'Add Project Members' interface. At the top right, there are 'Cancel' and 'Add to Project' buttons. Below is a search bar labeled 'Enter Names or Email Addresses' with a 'Select' button. The main area is a table with the following columns: Name/Email, Company, Roles, and Project Admin. The table contains five rows of member data.

Name/Email	Company	Roles	Project Admin					
Rick Nichols	Aesthetic Interiors	Owner	Project Admin	🔊	👤	🔒	🔒	🔒
Ben Johnson	General Construction	Construction Manager	Project Admin	🔊	👤	👤	👤	👤
bim360user7@yahoo.com	Ace Property Holdings	Construction Manager	Project Admin	🔊	👤	👤	👤	👤
bim360user6@yahoo.co...	Sparxx Electrical	Engineer	Project Admin	🔊	👤	👤	👤	👤
bim360user8@yahoo.oc...	General Construction	Superintendent	Project Admin	🔊	👤	👤	👤	👤

Members & Access Levels



# Integration Partners

Get the most out of construction technology by integrating the software you already use with BIM 360. Built on an open and secure API platform, BIM 360 enables users to easily integrate with various other construction softwares, including drone technology, estimating and bid management, as well as safety management tools.



Reality Capture

Cost Management

Estimating

Construction Management

Takeoff

Design Checking

Field Management

Layout

Bid Management

Scheduling

Accounting

Data Transfer

Learn More





# AUTODESK<sup>®</sup> BIM 360<sup>™</sup>

[bim360.autodesk.com](http://bim360.autodesk.com)