



Quality



Introduction

In today's digital age, quality assurance and control is faster, more effective, and better at mitigating risk. Quality control no longer needs to be reactive. Get critical information into the hands of those in the field by combining mobile technology on the jobsite with cloud-based collaboration and reporting. With standardized quality workflows, you can gain visibility into all project issues and quickly assign and resolve those issues, reducing unnecessary rework.

The following guide introduces the BIM 360 suggested quality 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](#).



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- Account Admin
- Integration Partners



Suggested Workflows

Quality Control Workflow

Ensure best practices on and off the jobsite by controlling quality through a streamlined workflow. The graphic below outlines the suggested quality control workflow using BIM 360.

Why follow this workflow?

- Easily track and review issues in a centralized location
- Utilize templates or create custom checklists
- Maintain a consistent quality control process

BIM 360 capabilities used

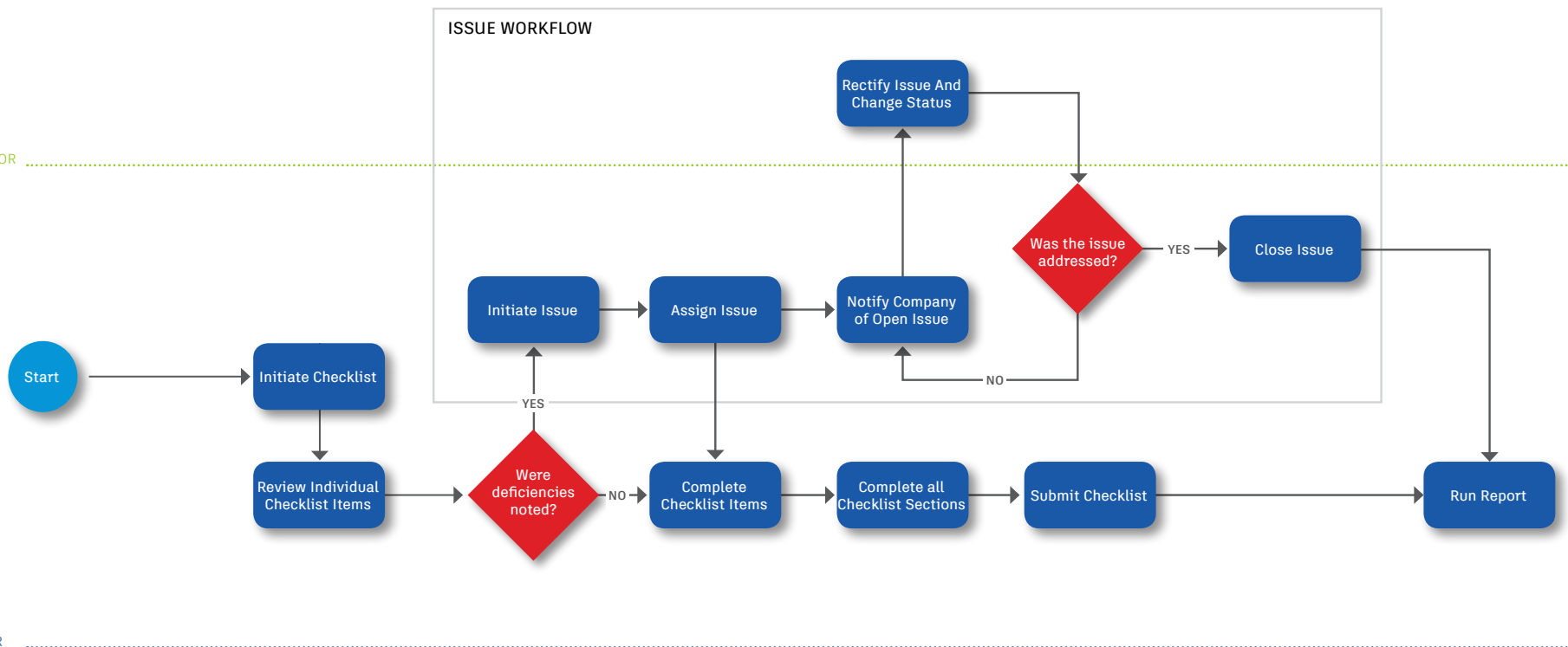
- Quality checklists
- Issue management



SUBCONTRACTOR



CONTRACTOR



Punchlist Workflow

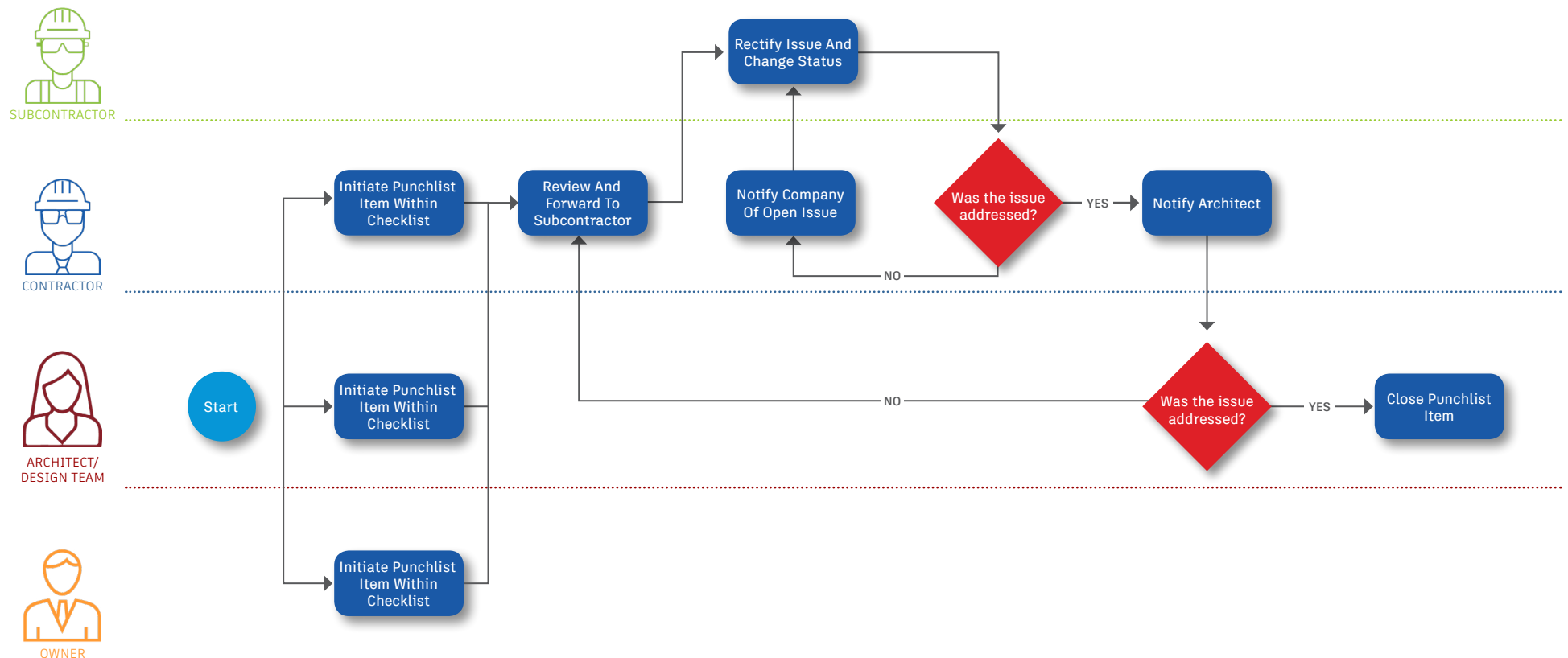
Successfully utilizing a streamlined punchlist process will increase efficiency and reduce errors. The graphic below outlines the suggested document management workflow using BIM 360.

Why follow this workflow?

- Easily initiate a punchlist review process
- Set appropriate review and approve privileges
- Track punchlists and improve visibility to project progress

BIM 360 capabilities used

- Quality checklists
- Issue management



Submittal Workflow

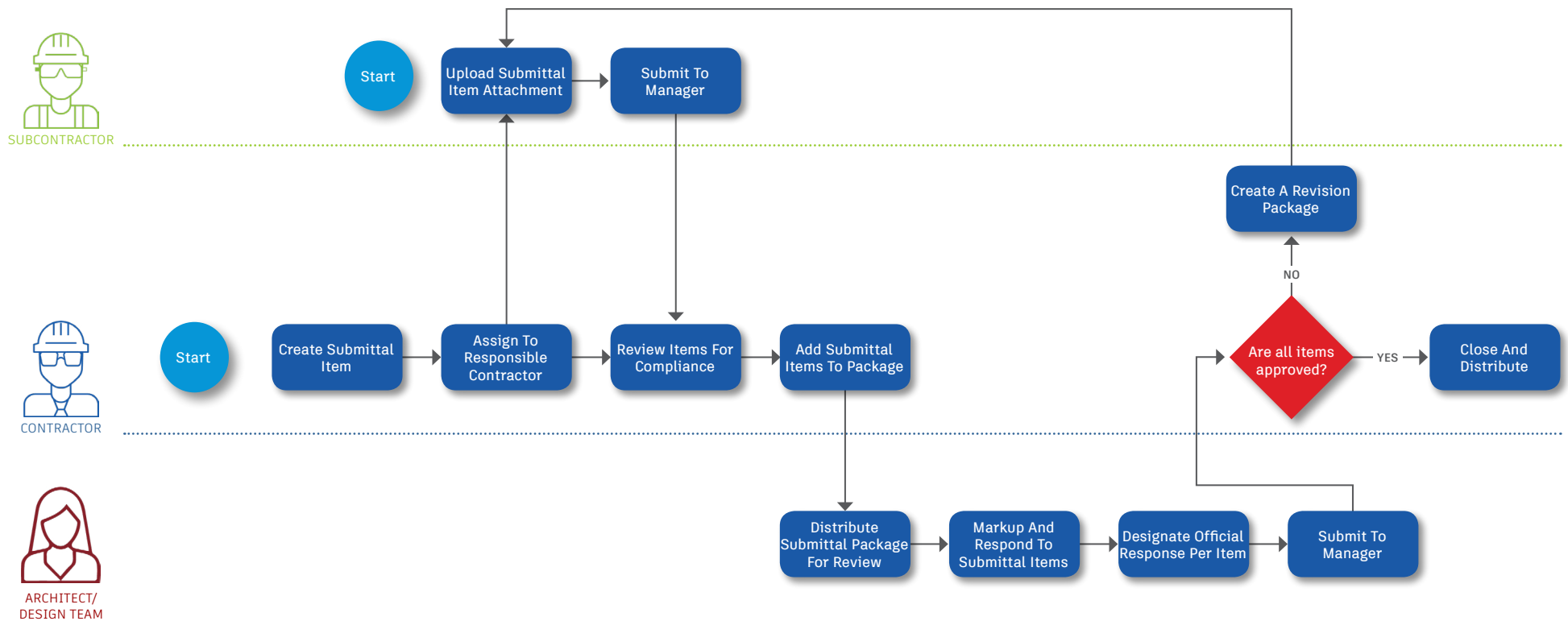
Create submittals packages, track the flow of approval processes, and manage all information in a single document library. The graphic below outlines the suggested submittal workflow using BIM 360.

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



Quality Capabilities

Quality Checklists

Quality problems that cost the most are the ones you miss. The checklist workflow makes sure your entire team is proactively managing quality standards from any device, anywhere. With the easy-to-use checklist builder, you can create quality checklists, punchlists, and commissioning templates, assign them to team members, and track status. Use Project Home to see your assigned checklists for the day, tomorrow, and the future. During the inspection use your mobile app to add notes, attach photos, and/or create issues for any nonconforming items. With the filters and reporting feature, you can identify trends and areas for improvement.

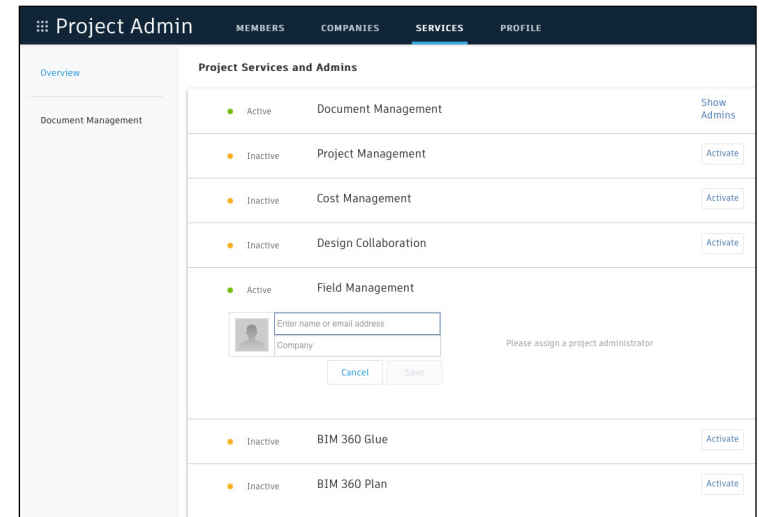


1

Activate the Field Management module

- A project admin needs to activate the Field Management module.
- In the Project Admin module select the Services tab, then “Overview” on the left sidebar.
- In the BIM 360 Field row, select “Filed Management” and click “Activate.” Designate at least one project admin.

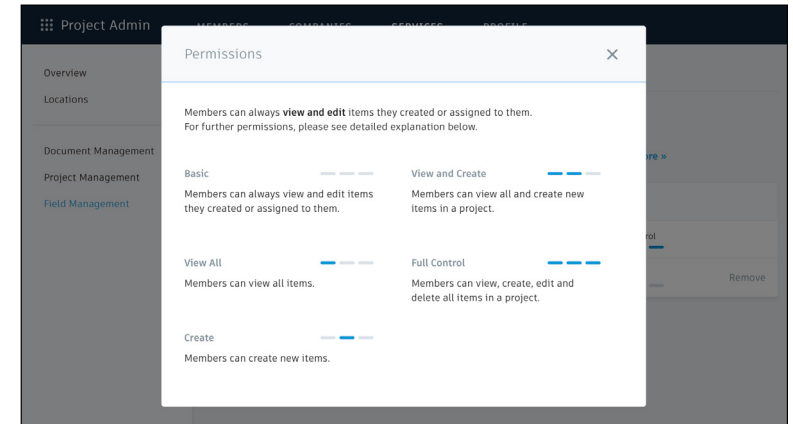
PRO TIP: The Document Management module needs to be activated first.



Quality Checklists

2 Designating issue permissions

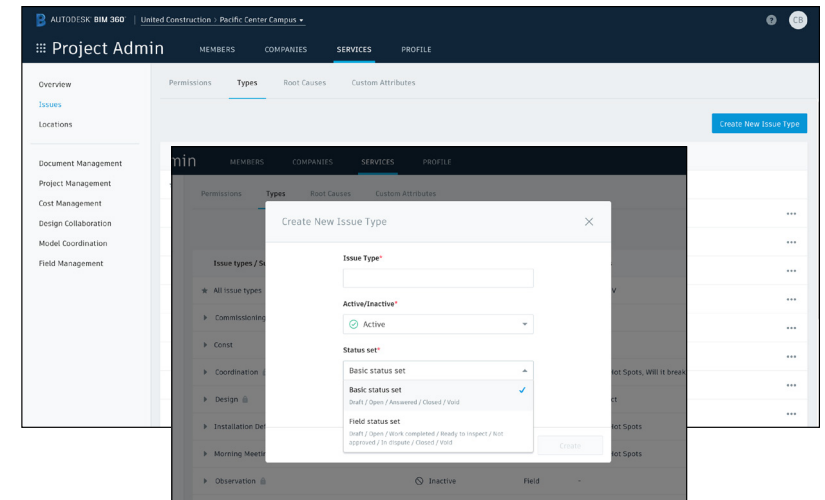
- In the Project Admin module, select the Services tab.
- On the left sidebar, click “Field Management.”
- Here you can designate user-, role-, or company-based permissions using the drop-down list.



3 Custom issue types

Project admins can control the issue types and sub-types available for selection. To make filtering issues more efficient, they can add custom issue types or sub-types.

- In the Project Admin module, select the Services tab and Issues on the left sidebar.
- Select the Types tab then click “Create New Issue Type.” Enter the name to appear in the issue drop-down list
- Optionally, change from Active to Inactive. Inactive keeps the newly created type from being available for use. Select the appropriate status set and click “Create.”
- Select the drop-down next to an Issue Type to reveal the sub-types. Add sub-types by clicking “Add Sub-type.” Enter the name of the sub-type and click the check-mark. Use the more menu (...) to edit/activate sub-types.



Adding Issue Types & Sub-types

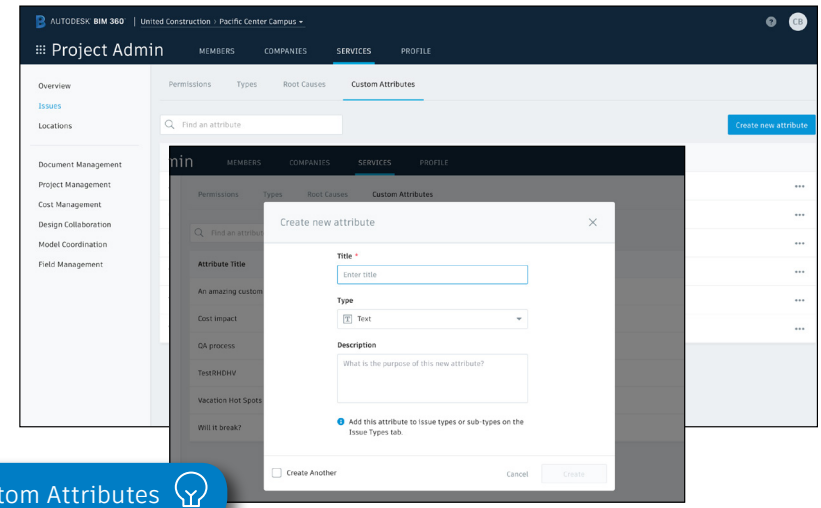
PRO TIP: Custom issue types can not be removed, they can only be turned off by using the more menu (...) to select Inactive.

Quality Checklists

4 Custom issue attributes

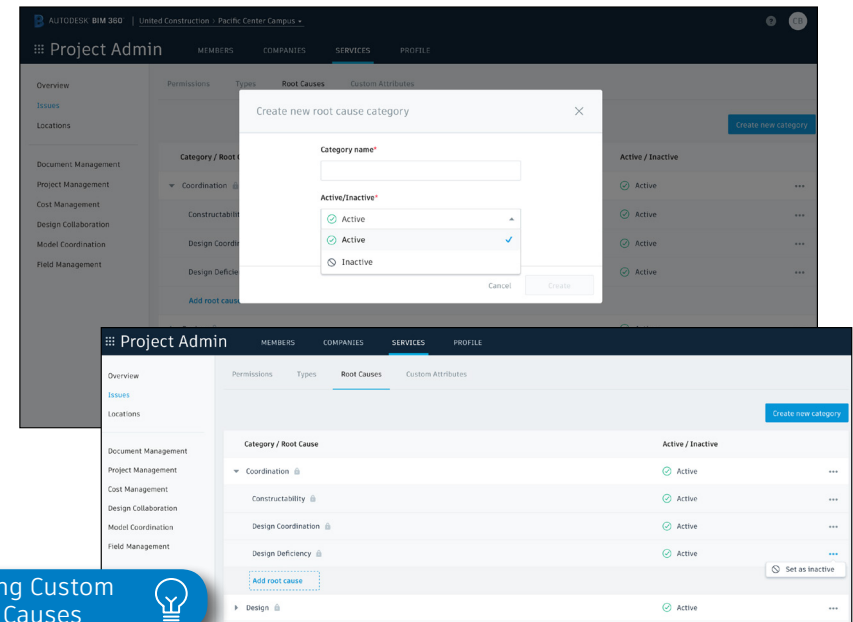
- In the Project Admin module, select the Services tab, Issues on the left sidebar, and then the Custom Attributes tab.
- Once on the Custom Attributes tab click “Create New Attribute.” Add a title and use the type drop down to select the field you need (text, dropdown, paragraph or numeric).

PRO TIP: Once the custom attribute has been created, you have the option to map the attribute to Issue Types and Sub Types.



5 Custom root causes

- In the Project Admin module, select the Services tab, Issues on the left sidebar and then the Root Causes tab.
- First you need to create a category. Click “Create New Category” and enter a category name. Optionally, you can set it to inactive to delay usage while creating root causes. Click “Create.”
- Once you’ve created a category you can start creating root causes. Select the drop-down next to a Category to reveal the root causes for that category. Add a root cause by clicking “add root cause.” Enter the name of the root cause and click the check-mark. Use the more menu (...) to inactivate root causes.



Quality Checklists

6 Creating checklists

Creating a checklist template: Project admins and users designated with “Create” permission can use the template builder to quickly add sections and items to create a new template.

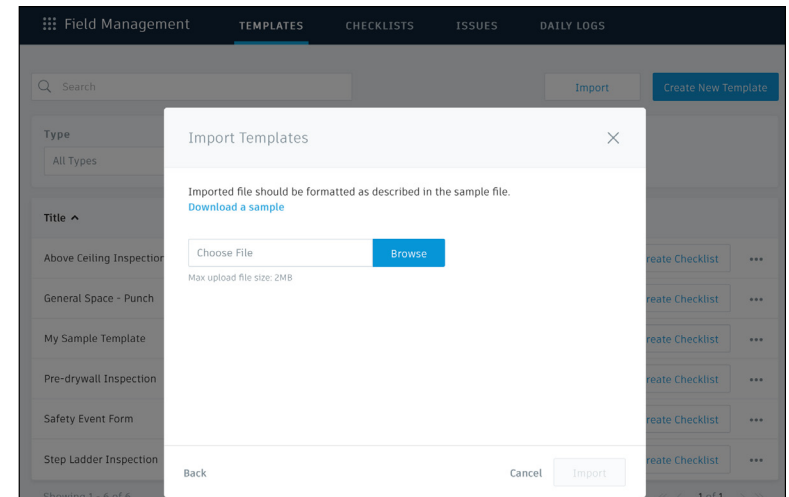
- In the Field Management module, select the Templates tab and click “Create New Template.”
- Select the template type (e.g., Quality) using the “Type” drop-down list, then click next.
- Here you will start building out the template. Add in section names such as “general,” and click “Add new item” to start populating questions related to that section.
- For each question, click the drop-down list to select the response type and fill in necessary fields. Select (...) to add a description, set as optional, or delete.
- When done, click “Publish.” Now the template can be used to create new checklists.

The screenshot shows the 'Above Ceiling Inspection' checklist template builder interface. The top navigation bar includes 'Field Management', 'TEMPLATES', 'CHECKLISTS', 'ISSUES', and 'DAILY LOGS'. The main title is 'Above Ceiling Inspection'. Below the title, there is a '+ Add Section' button. The first section is '1 General'. It contains two items: '1.1 Are all wires / cables off the Sprinkler and Med Gas pipes?' and '1.2 Is fire proofing on structural steel intact?'. Each item has a response type dropdown menu. For item 1.1, the dropdown shows 'Yes / No / NA'. For item 1.2, the dropdown shows 'Yes / No / NA'. There is an 'Add new item' button at the bottom right of the section. A bottom navigation bar shows '1. Basic Information' and '2. Template Information' (highlighted). There are 'Cancel' and 'Publish' buttons at the bottom right.

Quality Checklists

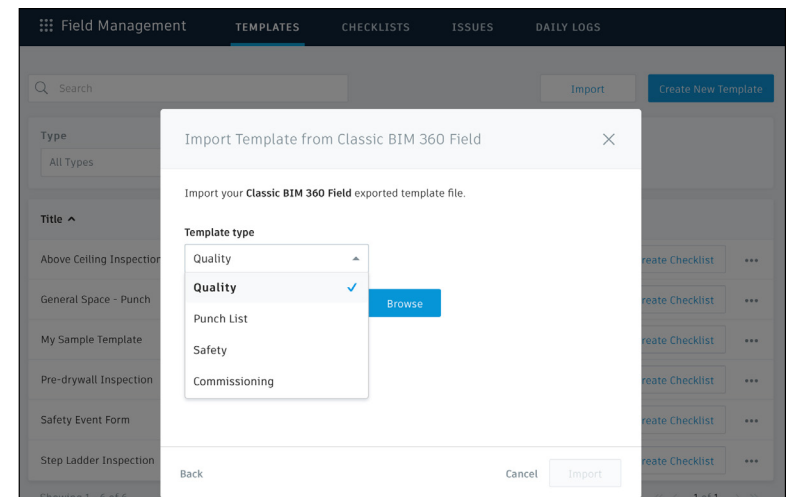
Import a template from excel:

- In the Templates tab, select “Import.”
- Check “Import Templates” and click “next.”
- If you don’t have a properly formatted spreadsheet, click “Download a sample” and enter your information in the spreadsheet. Rename and save the file.
- If you have a properly formatted spreadsheet, select “Browse” to choose the file, then “Import.”



Import a template from classic BIM 360 Field:

- In classic BIM 360 Field, export from the admin space the checklist template that you want to import. Save it to your computer.
- In the Templates tab, select “Import.”
- Check “Import Template from Classic Field” and click “next.”
- Specify the template type, click “Browse” to select the file, then “Import.”
- Once it is imported, you can edit the template as needed.



Quality Checklists

7 Adding checklists to a project

- In the Templates tab, use the search bar or filter by type to find the checklist you need.
- Click “Create Checklist” in the list view, or open the checklist and click “Create Checklist” to add it to the project.
- Once the checklist has been added, a new window will pop up where you will see a details box. Complete all necessary fields.

PRO TIP: Add a checklist to the project with the BIM 360 mobile app by tapping “+” in the checklist to select your template.

The screenshot shows the Autodesk BIM 360 Field Management interface. At the top, there's a navigation bar with 'Field Management' and tabs for 'TEMPLATES', 'CHECKLISTS', 'ISSUES', and 'DAILY LOGS'. A notification at the top right says 'Checklist Pre-drywall Inspection has been created.' Below the navigation bar, there's a section for 'Pre-drywall Inspection' with a 'NOT STARTED' status. The main area displays a checklist with two sections: '1 Framing' (0 / 4 Comp) and '2 Electrical' (0 / 7 Comp). Each section contains several items with radio button options for 'Yes', 'No', and 'NA'. A 'Details' sidebar on the right includes fields for 'Assigned To', 'Location', 'Scheduled', 'Type', and 'Description'.

8 Completing checklists

- Complete your checklist in the field with the BIM 360 mobile app.
- Tap “Checklists” and select a checklist from the list.
- As you perform your inspection, review the criteria for each item and enter the appropriate response.
- (Optional) Add a note or photo by tapping the icon under each item. Use the photo markup tools to refer to specific areas in the photo.
- (Optional) For noncompliant items, you can create issues. Tap the issue icon and fill in the necessary fields. You can snap a photo and add markups. The issue is added to the project issue list.
- Tap “Save” when complete.

The screenshot shows the BIM 360 mobile app interface for an 'Above Ceiling Inspection'. It features a 'Back' button and a 'Done' button. The checklist is divided into sections: '1 General' (11/11 items), '1.4 Is pipe insulation complete?', '1.5 Are electrical junction boxes covered and labeled?', and '1.6 Are valve tags installed?'. Each item has a 'YES' (green), 'NO' (red), or 'N/A' (grey) button. Below each item are icons for 'Issue', 'Note', and 'Photo'. The bottom status bar indicates '1/6 Sections Completed'.

The screenshot shows the BIM 360 mobile app interface for a 'General Space - Punch' checklist. It features a 'Back' button and a 'Done' button. The checklist is divided into sections: '1 Door' (4/4 items), '1.2 Door Frame', '1.3 Door Hardware', and '1.4 Threshold'. Each item has a 'YES' (green), 'NO' (red), or 'N/A' (grey) button. Below each item are icons for 'Issue', 'Note', and 'Photo'. A note for item 1.3 reads 'Note: Wrong swing' with a status of 'IN DISPUTE'. The bottom status bar indicates '0/10 Sections Completed'.

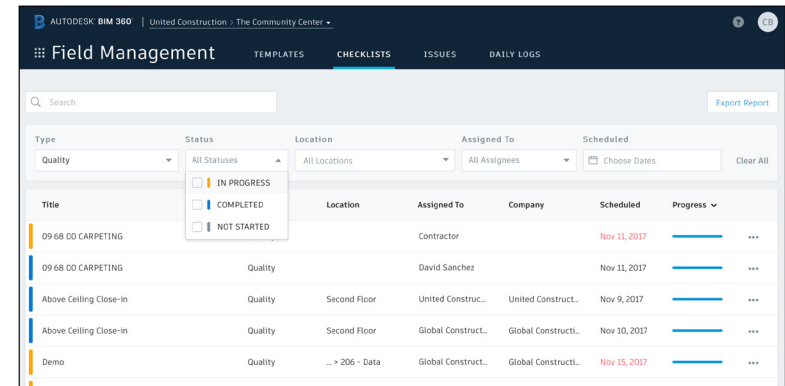
Working with
Checklists



Quality Checklists

9 Filter and sort

- On a mobile device, tap “Checklists” then use the filter options.
- On a computer select the Field Management module then the Checklists tab to filter with the drop-down lists or sort by clicking the column headers.

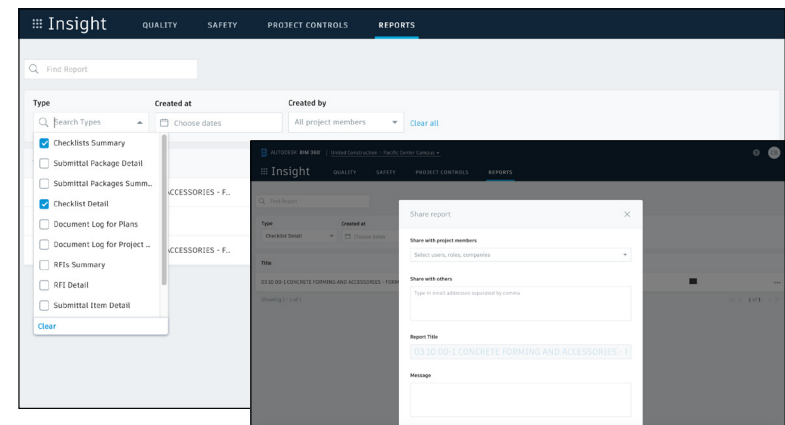
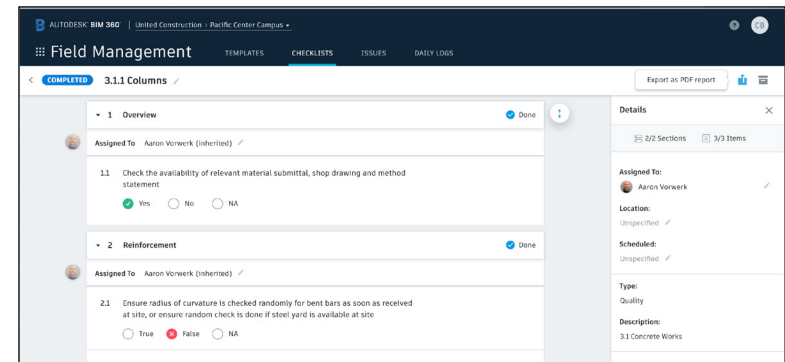


10 Exporting reports

- On a computer select the Field Management module then the Checklists tab.
- To export a summary report of all clicklists click “Export Report.” 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 checklist select to open the checklist. Then click the folder icon in the top right corner. The report will be emailed to you.

PRO TIP: Use the reports tab in the Insight module to access all exported summary and detailed checklist 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.



Issue Management

Don't let problems slow you down. The ability to create, assign, track, and respond to issues on any device is a critical workflow. With the Field Issue Management functionality, you can easily track work to complete, problems to fix, areas to inspect, and more. Add context around the issue resolution by adding photos and collaborating on comment threads. With a central view of all project issues, tracking status and analyzing root causes has never been easier.

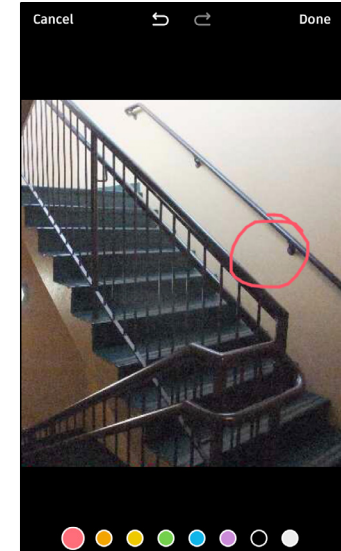


1

Creating issues

- On your mobile device, navigate to Filed Issues and tap the plus icon. Or on your computer, in the Field Management module select the Issue tab and click “Create New Issue.”
- Identify the issue type, sub-type, status and title. Then complete all desired fields including such as location and root cause. Make sure to assign the issue and select a due date.
- When creating an issue on your mobile device, add more context by including a photo. Click the camera icon to snap a photo or select from your photo library, mark it up, and attach it to the issue.

PRO TIPS: All Issues are unified meaning the same Issue added via the Field Management can also be viewed in the Document Management module.

A screenshot of a mobile application interface for creating a new issue. The form is titled "New Issue" and has a "Cancel" button on the top left and a "Create" button on the top right. The form fields include: "Type" (Safety), "Sub-Type" (Safety Infraction), "Status" (OPEN), "Title" (with a red border and a "Required" label), "Description" (with a "Tap to add a description" prompt), "Assigned to" (Unassigned), and "Location" (Unspecified). There are character counts for the title (0/100) and description (0/1,000) fields.

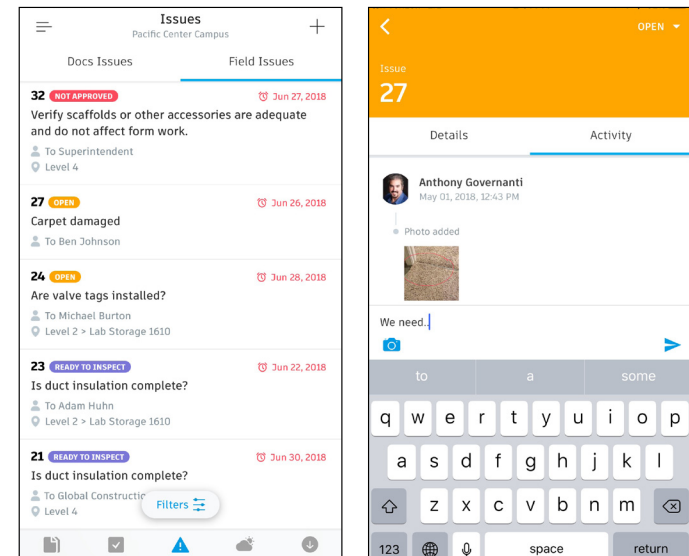
Creating Field Issues



Issue Management

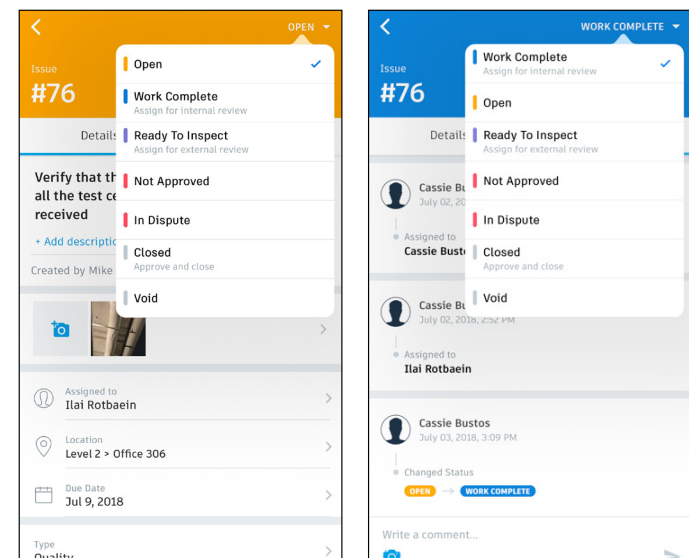
2 Review & respond to issues

- If you're the assignee, open the email notification and select "View the Issue" to be directed to the issue.
- On your mobile device, navigate to the list of all field issues. Scroll/filter and tap the issue to open. Or on your desktop, in the Field Management module select the Issues tab and search for the issue.
- Once the issue window is open, tap/select "Activity."
- Use the comment box to write a comment. On your mobile device you can click the camera to attach a photo.



3 Changing issue status

- On your mobile device, navigate to the list of all field issues.
- Scroll/filter and tap the issue to open. Or on your desktop, in the Field Management module select the Issues tab and search for the issue.
- Once the issue window is open, tap/select the status drop-down list in the top-right corner to select a new status.
- Only the issue owner or project admin can set the issue to closed after checking for completion of work or that the safety hazard has been remedied.

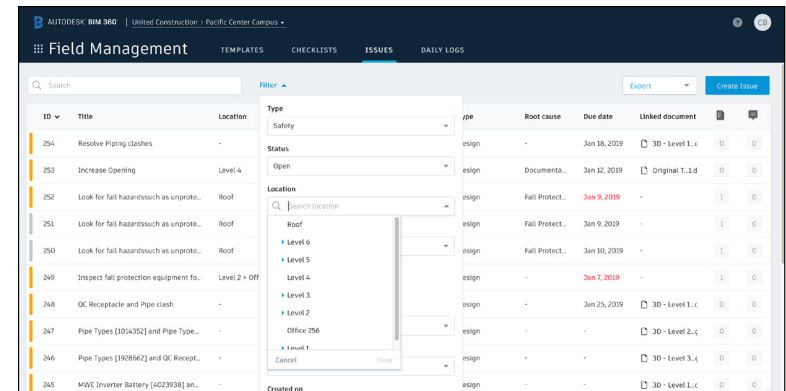


Issue Management

4 Filter and sort

- On your mobile device, tap “Issue” then use the filter options to filter by status, assignee, or due date.
- On a computer select the Field Management module then the Issues tab to filter with the drop-down lists or sort by clicking the column headers.

PRO TIP: You can open a sheet or model to view associated field issues. Once open use the issues viewer on the left panel.

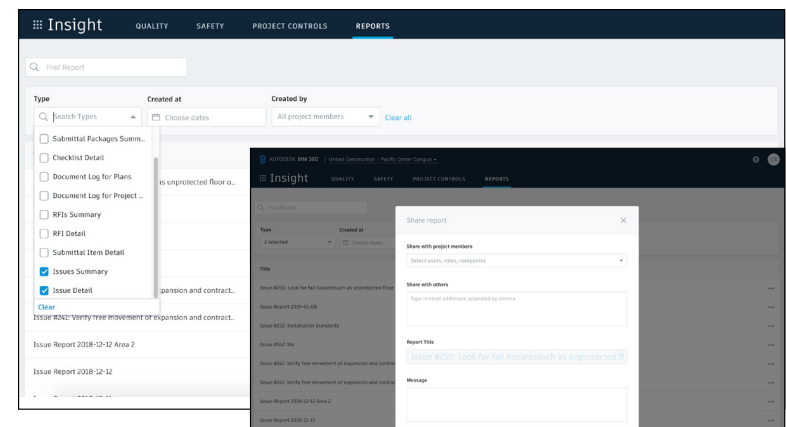
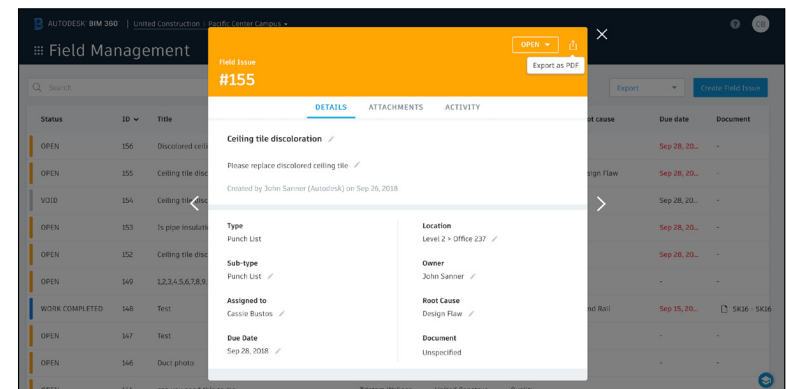


5 Exporting reports

- On a computer select the Field Management module then the Issues tab.
- To export a summary report of all issues click “Export Report” and select PDF or CSV. 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 issue select to open the issue. Then click the folder icon in the top right corner. The report will be emailed to you.

PRO TIP: Use the reports tab in the Insight module to access all exported summary and detailed issue 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.



RFI Management

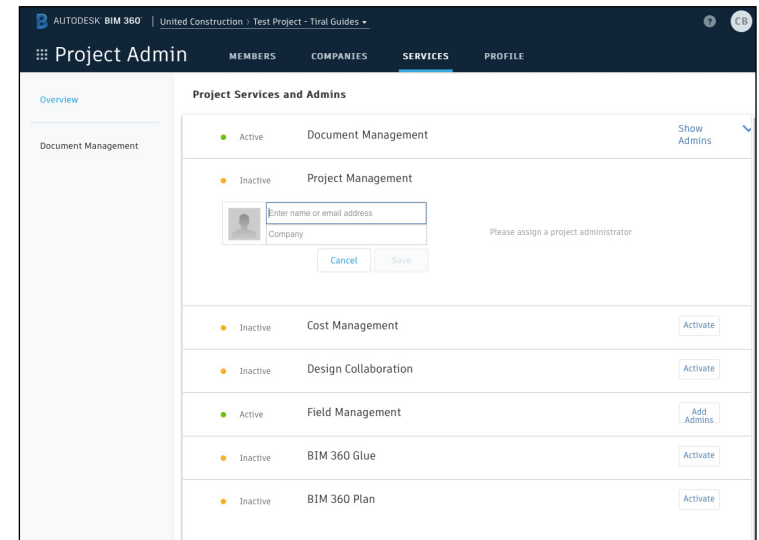
Enhance your RFI workflow by automatically posting RFIs to 2D documents and 3D models. Create accountability by designating “roles” to keep the process moving. Initiate requests and manage reviews and approvals from any device. And by publishing and storing this information in a single cloud-based repository,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

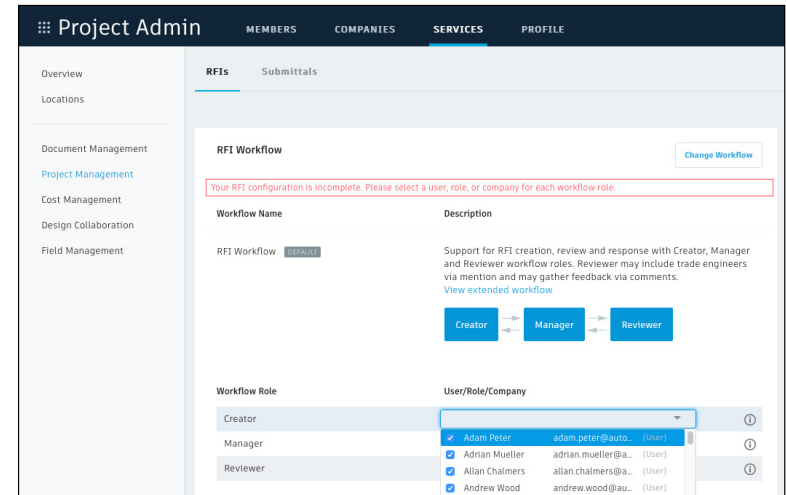


RFI Management

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.

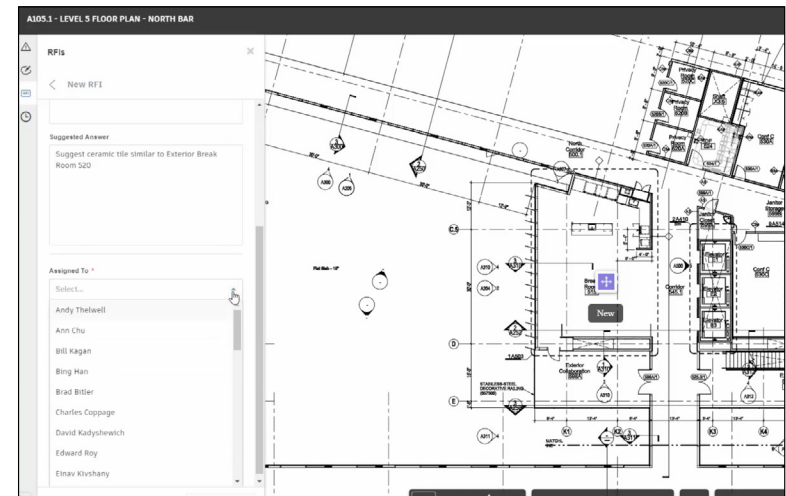
PRO TIP: You can create a project-level RFI and then associate it to a document or model by using the “Linked Documents” option.



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.



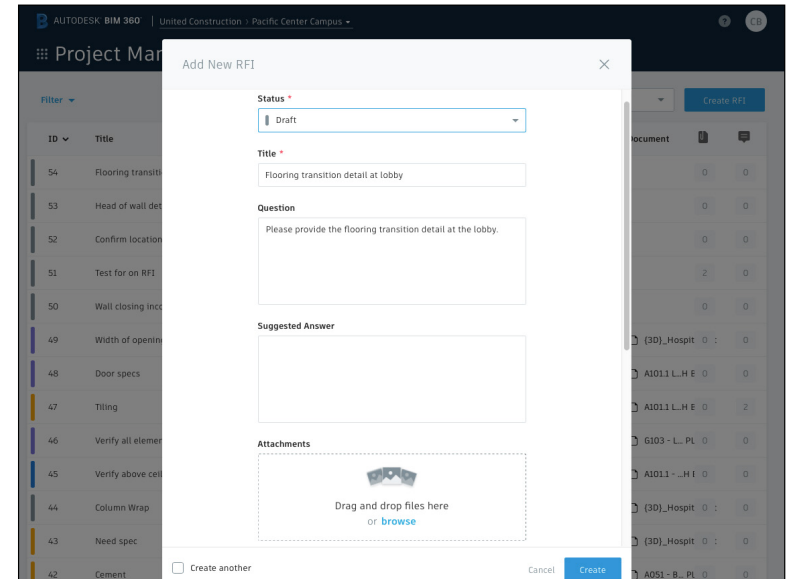
Creating RFIs

RFI Management

4 Creating project-level RFIs

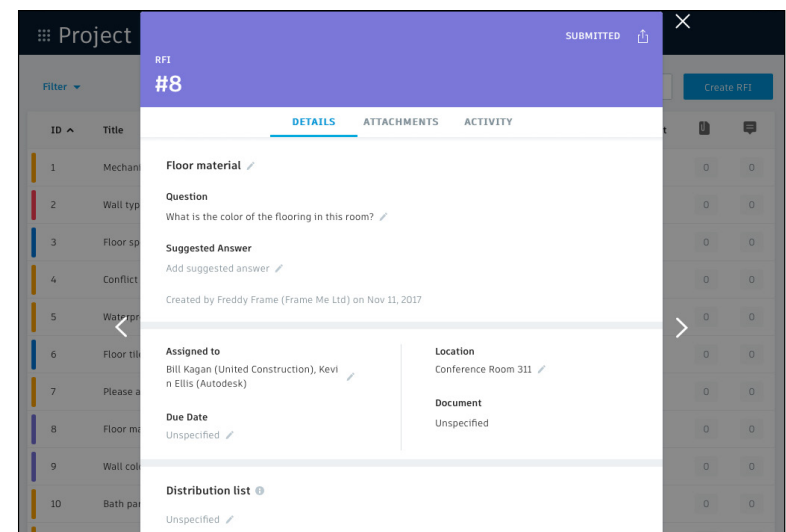
- Project-level RFIs are RFIs not associated with a document or model.
- In the Project Management module, select the RFIs tab and click “Create RFI.”
- Once the “Add New RFI” box opens, enter a title and complete all necessary fields. By default, the RFI status will be set to Draft. When ready to assign, 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.



5 View/edit/submit RFIs

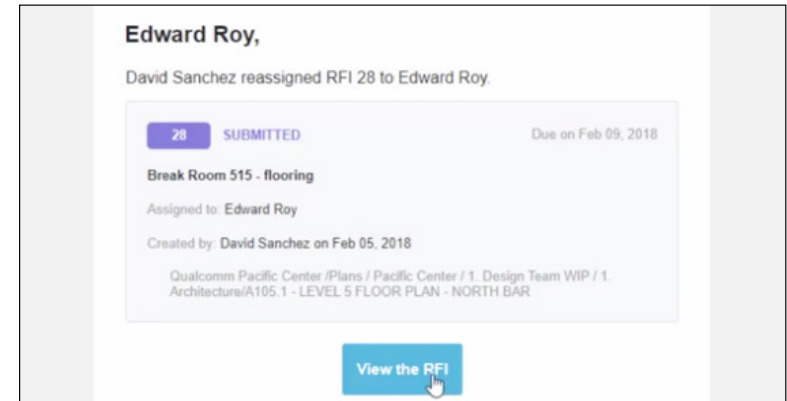
- View all project-level RFIs in the RFIs tab. Click to open the RFI and use the pencil icon to edit any necessary fields.
- For document or model-based RFIs, under “Details” click the document hyperlinks to open the associated document. Or when viewing a document or model use the RFI panel to navigate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



RFI Management

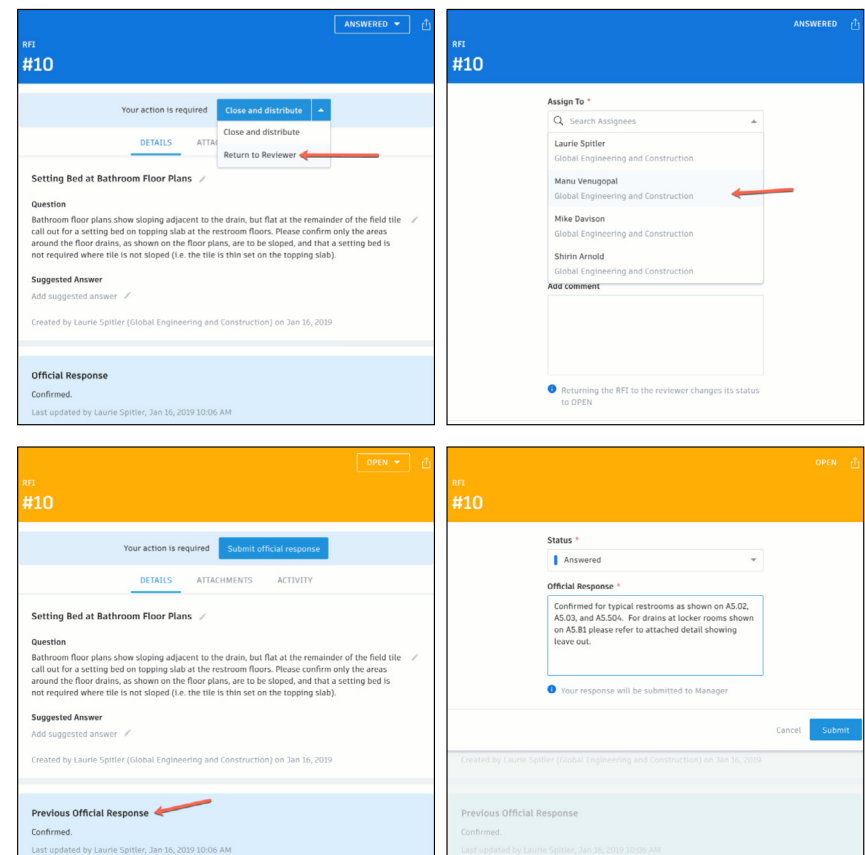
6 Review & respond to RFIs

- 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

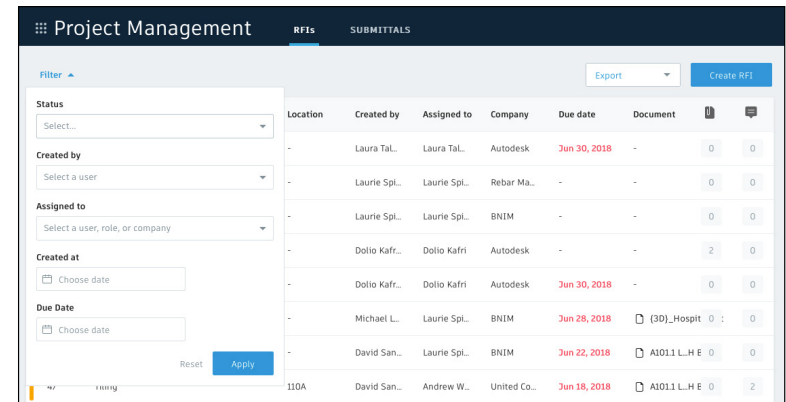
- Re-open RFI is intended as an administrative override to revert an RFI to the Reviewer's court if the answer is incomplete in some way. It is not intended to act as a revision process.
- When an RFI Manager receives a response that is incomplete, they have the option to Return to Reviewer. Use the 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.

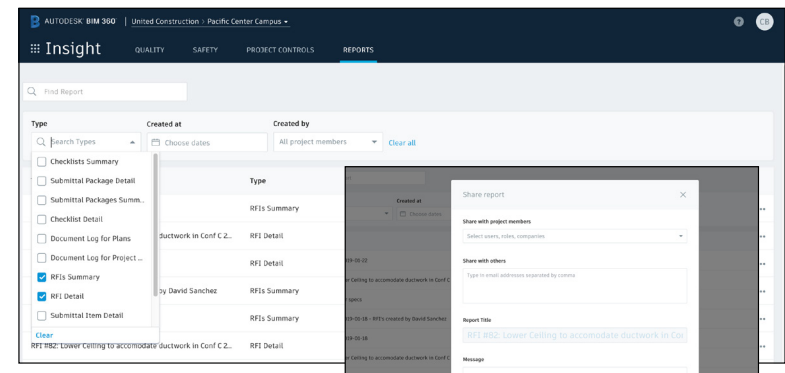
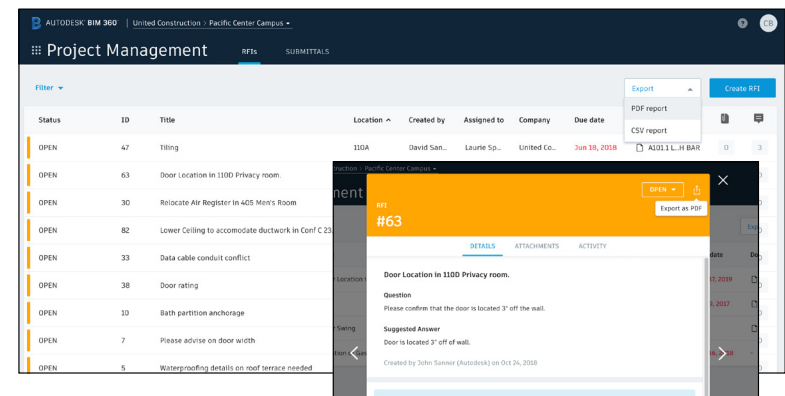


9 Exporting reports

- 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



The screenshot shows the 'Project Admin' interface with the 'SERVICES' tab selected. On the left sidebar, 'Project Management' is highlighted, and 'Submittals' is selected under it. The main content area shows the 'Submittals' management section. It includes a 'Manager' section with a description: 'The Submittal Manager has sole permissions to submit packages for review, and close them.' Below this is a table with columns for 'Member', 'Role', and 'Remove'. The table lists several members and their roles, including 'Wes Newman' (Architect), 'Zohar Liran' (Construction Manager), 'urie.spitler@autodesk.com' (Contractor), 'vin.ellis@autodesk.com' (Designer), 'm360user20@yahoo.com' (Document Manager), 'irin.arnold@autodesk.com' (Engineer), and 'Manu Venugopal' (Estimator). Each row has a 'Remove' button next to it. There is also an 'Add' button in the top right corner of the table.

Member	Role	Remove
Wes Newman	Architect	Remove
Zohar Liran	Construction Manager	Remove
urie.spitler@autodesk.com	Contractor	Remove
vin.ellis@autodesk.com	Designer	Remove
m360user20@yahoo.com	Document Manager	Remove
irin.arnold@autodesk.com	Engineer	Remove
Manu Venugopal	Estimator	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

The screenshot shows the 'Submittal Item #16-093000' details page. The page has a top navigation bar with 'OVERVIEW', 'DETAILS', 'ATTACHMENTS', and 'ACTIVITY' tabs. The 'DETAILS' tab is active. The page is divided into two main sections: 'General Info' and 'Participants'. The 'General Info' section includes fields for 'Spec section' (093000 - TILING), 'Spec sub section' (1.05A), 'Title' (Product Data CT-3), 'Description' (CT-3), 'Type' (Product Data), 'Package' (093000-003 Tile Product Data CT-1 CT-2 CT-3), 'Assigned to' (Manager: Bill Kagan [Global Construction]), and 'Due date' (Nov 9, 2017). The 'Participants' section includes fields for 'Manager' (Bill Kagan [Global Construction]), 'Reviewer' (David Sanchez [BNIM]), 'Co-Reviewers' (Unassigned), 'Responsible Contractor' (Carl Clad [Cover me Ltd]), and 'Distribution list' (Michael Burton [Elegant Design], Edward Roy [Global Construction]).

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.).

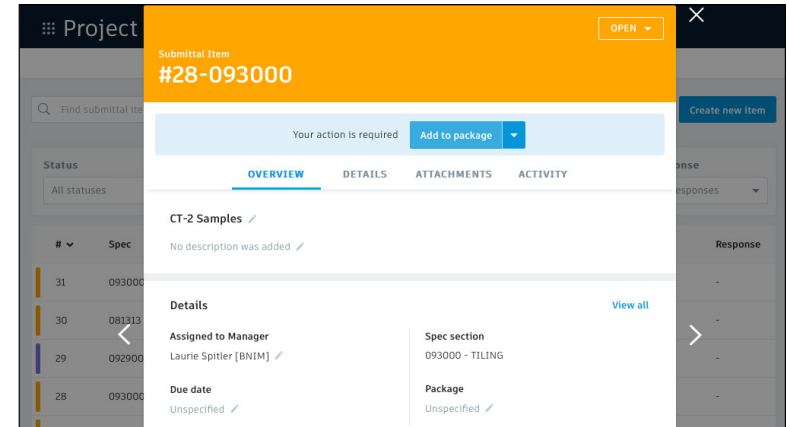
Creating Submittal Packages

The screenshot shows the 'Create new package' form. The form has a title bar 'Create new package' and a search bar 'Find submittal'. The form is divided into two main sections: 'Spec section' and 'Title'. The 'Spec section' section includes a dropdown menu 'Choose a spec section' and a 'Create new' link. The 'Title' section includes a text input field. The form also includes fields for 'Reviewer' (Select Member), 'Co-Reviewers' (Add co-reviewers), and 'Distribution list' (Select Members). At the bottom of the form, there is a checkbox 'Create another' and 'Cancel' and 'Create' buttons.

Submittal Management

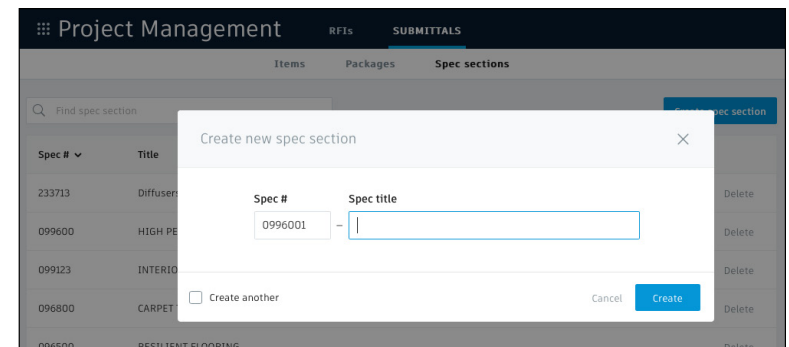
4 Adding submittal items to package (submittal manager)

- 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.



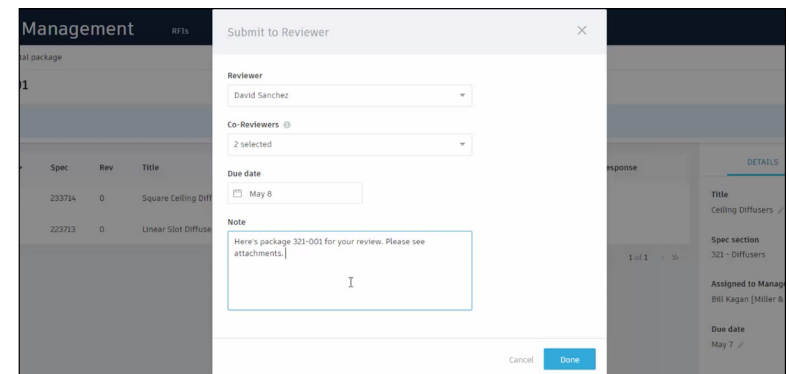
5 Creating spec sections (Submittal manager)

- 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.

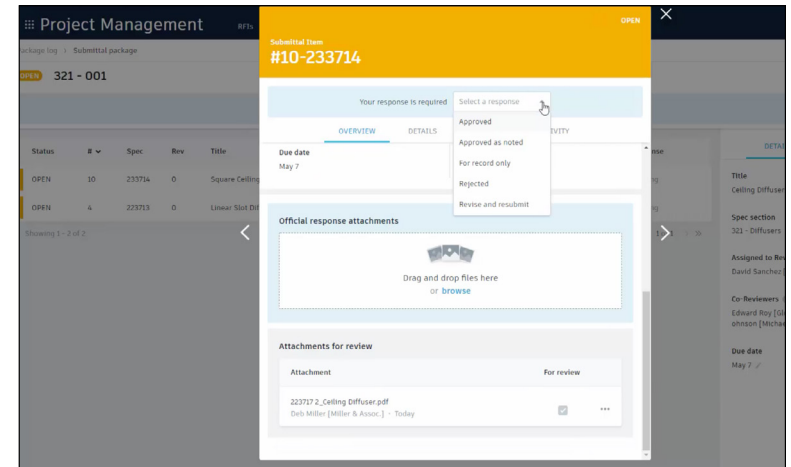


Submittal Management

7

Reviewing submittal items (reviewer)

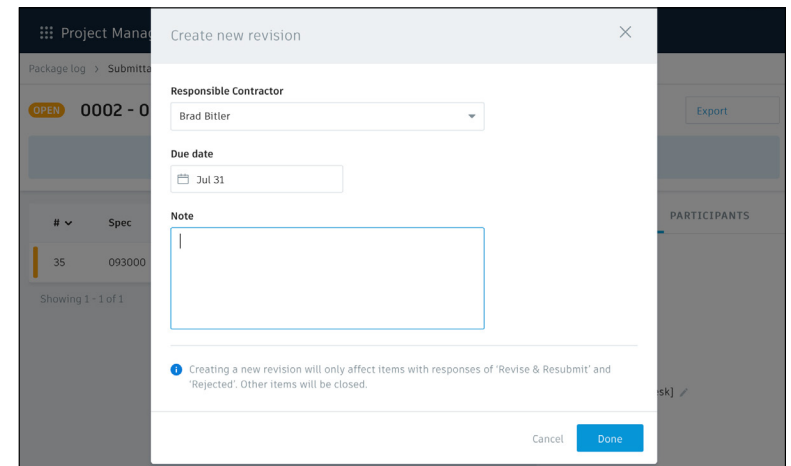
- Click to open the item(s) for review within “Attachments.”
- Designate office response using the drop-down list next to “Your response is required.”
- Upload any official response attachments and submit back to the manager.



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

Package log > Submittal package

OPEN 096800 - 001

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

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

Package log > Submittal package

OPEN 096800 - 002 Rev. 1

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

DETAILS PARTICIPANTS

Title: Moisture Test

Spec section: 096800 - CARPET TILE

Assigned to Manager: Bill Kagan [United Construction]

Due date: Unspecified

Close and distribute

Responsible Contractor: Ben Johnson

Distribution list: 3 selected

Note:

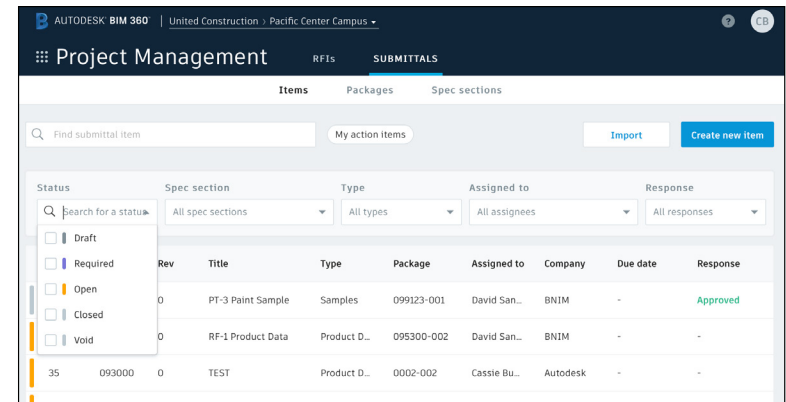
After closing, the package will be assigned to the 'Responsible Contractor' and will be available for viewing to all project members.

Cancel Done

Submittal Management

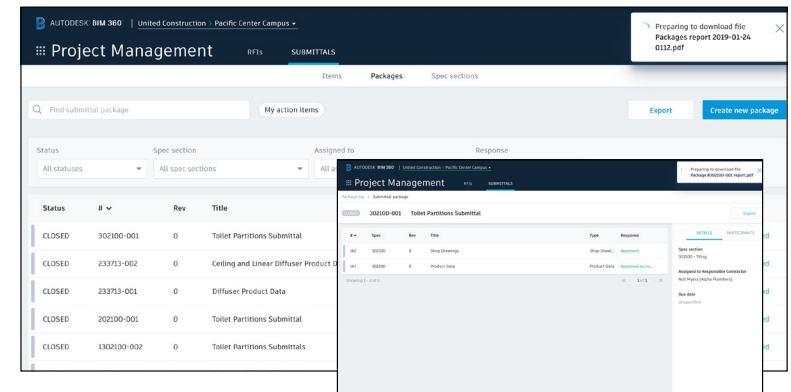
11 Filter and sort

- 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.



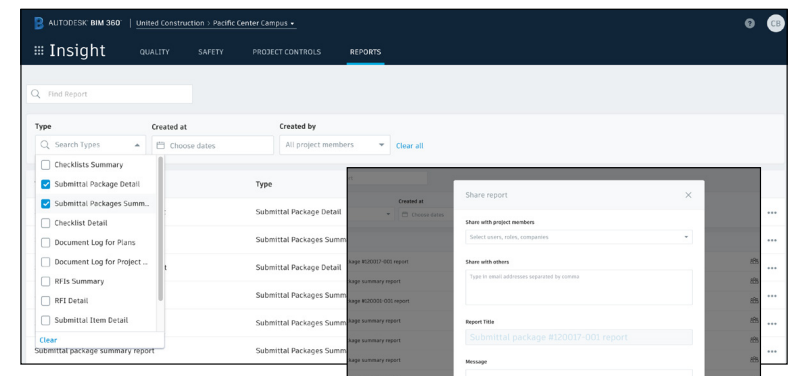
12 Exporting reports

- 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 exported 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.



Daily Logs

Log daily site activities to keep track of your project progress and performance. With the Daily Log workflow, track daily weather conditions to shed light on any delays caused on unforeseen circumstances, track manpower by logging detailed labor information per company, and document any issues or successes that may have occurred throughout the day.

1 Creating daily logs

- In the Field Management module, select the Daily Logs tab.
- Click the calendar icon to select a month and day.
- To add in the daily weather, click the location box to set your location and select “Get Weather.” Edit any necessary fields using the pencil icon.
- For Labor, click “Add labor item” and populate the fields. Repeat to add another labor line. The daily labor total will calculate.
- General notes can be added to the notes box.
- When done, click “Publish.”

PRO TIP: Published logs are visible to the team and can't be edited.

Working with
Daily Logs



The screenshot shows the 'Daily Logs' interface for Thursday, May 24, 2018. The interface is divided into two main sections: Weather and Labor.

Weather Section:

- Location: San Francisco, CA, USA
- Weather: Sunny and
- High: 59°F (At 02 PM)
- Low: 52°F (At 01 AM)
- Wind: 8.7mph
- Precipitation: 0.0in
- Visibility: 0.0mi
- Humidity: 83%
- Powered by: ClimaCell

Labor Section:

Company Name	Workers	Hours
Total:	44 Workers	472 Hours
Crystal Clear Glazing	12	120
United Construction	32	352

Buttons: Add labor item, Publish

Additional Capabilities

Insight & Reporting

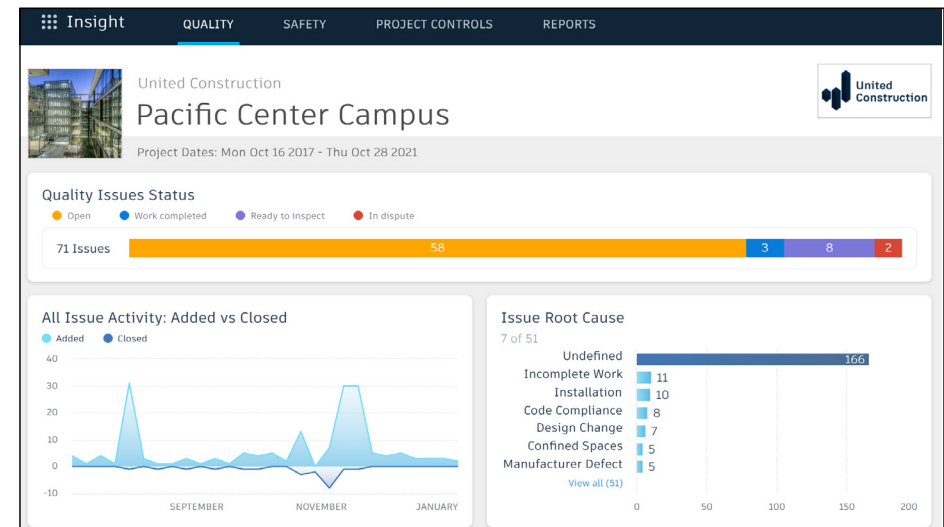
Having the right information at your fingertips is key to making better business decisions. With the Insight module, teams have visibility into high-level issues that might be holding up project schedules and driving up costs. By quickly seeing where issues are happening and putting the right steps in 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



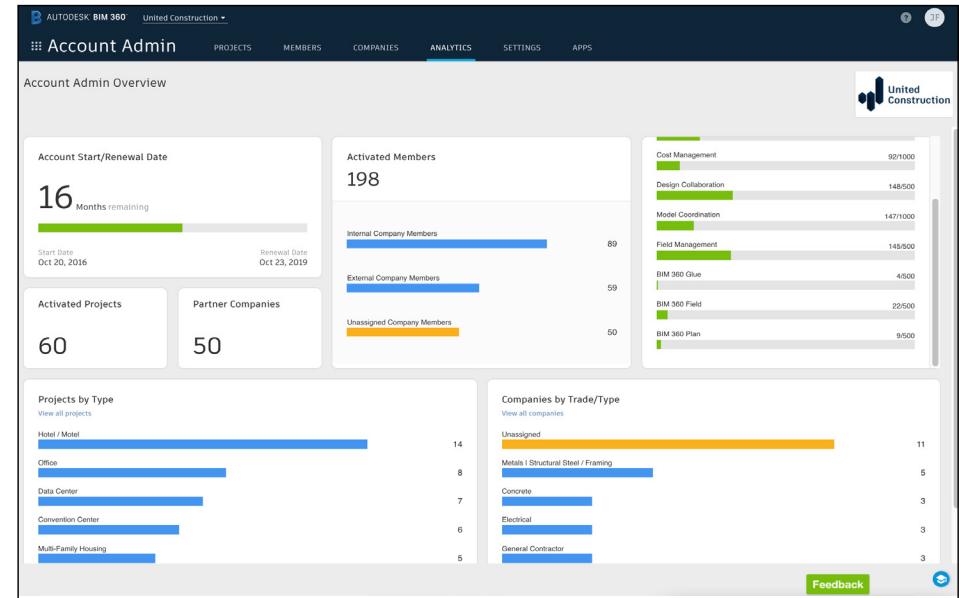
Insight Blog



Insights & Reporting

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.

Project Home

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

Project Address
JACKSON SQUARE
FINANCIAL DISTRICT
DEN PLACE
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 RFIs | 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

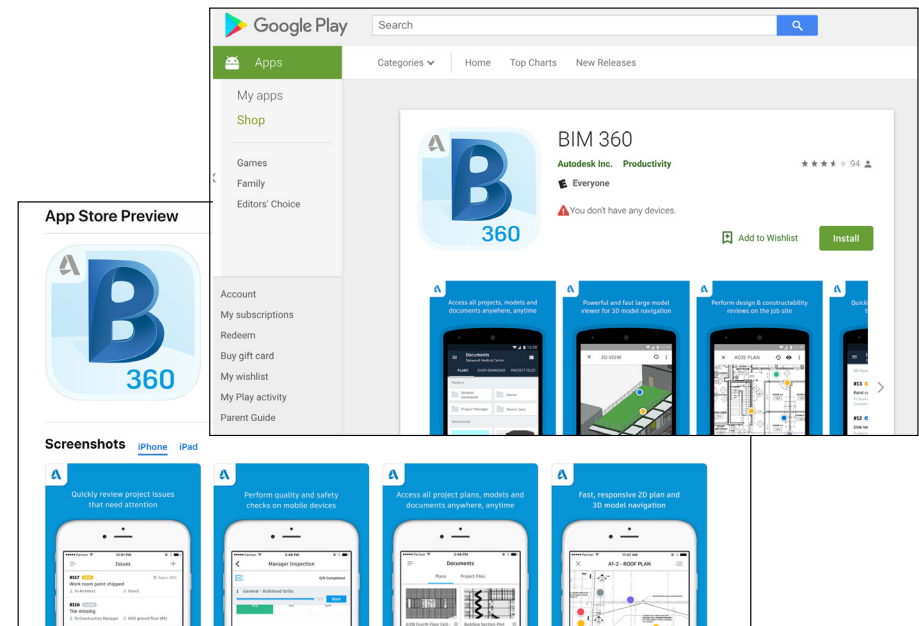
Download the BIM 360 app

- 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.

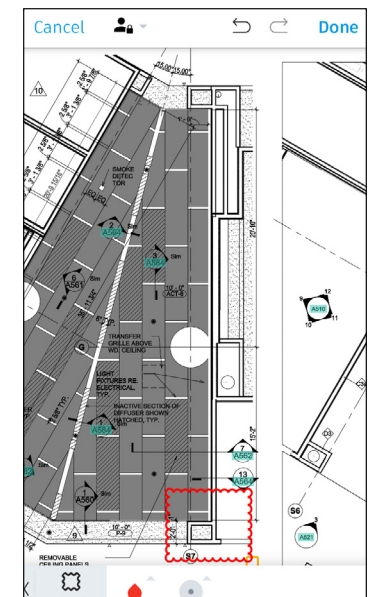
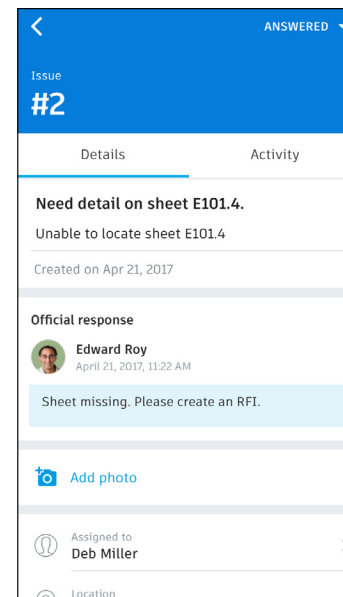
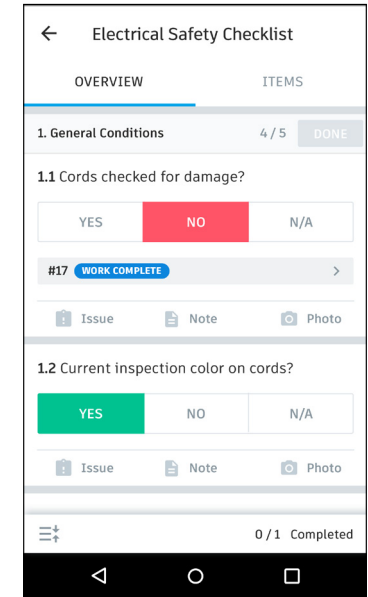
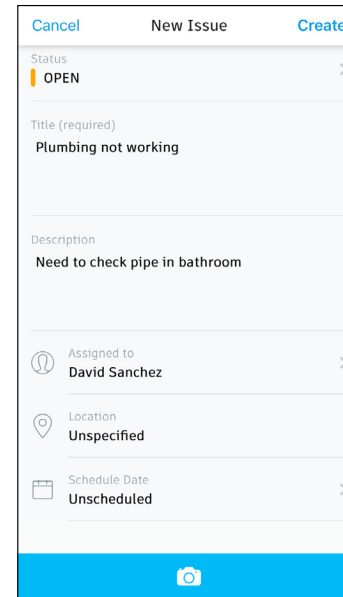
[BIM 360 Mobile Capabilities](#) 

[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 

Create Project Profile

Step 1 of 2

* Project Name

Project name is valid.

* Project Type


Construction Type

* Project Value

USD

Project value is valid.

Project Image



Select image to upload
JPEG, GIF, PNG, or BMP file
(4MB max)

Browse

Project Address

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.”

Activate Services
Step 2 of 2

To activate a service, click Activate and assign at least one project admin to the service. When you assign a project admin, an email invitation will be sent to the admin. Project admins manage all project level administration for their service. For example, a BIM 360 Field project admin can copy projects, create and manage checklists, and invite companies and project team members to their projects. [Hide](#)

Document Management
Inactive

Copy project settings ([Learn more](#))

Select Project

All Projects

- 01&03
- AU 2017 AR Demo project
- Alameda High School
- Alpine Retreat
- BZ Migration Testing
- Bayfront Arena
- Bio Comanv Tower

Please assign a project administrator

Enter name or email address

Company

Cancel Save

Activate

Design Collaboration
Inactive

Activate

BIM 360 Glue
Inactive

Activate

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.

Invite Account Admin

To invite new Account Admins to manage your account, enter their email addresses, and select Account Admin in the Access Level dropdown. The Account Admins will receive invitation emails with links to BIM 360 administration.

Invite Account Admins to manage your account. [Add](#)

Email	*Default Company	Default Role	Access Level
test@autodesk.com	Autodesk	Select Role	Account Admin

Select Role

- Architect
- Construction Manager
- Contractor
- Designer
- Document Manager
- Engineer
- Estimator
- Executive

☒ Account Admin

☐ Executive Overv

Cancel Invite

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, there are 'Cancel' and 'Add to Project' buttons. Below them is a search bar labeled 'Enter Names or Email Addresses' with a 'Select' button. The main area is a table with columns: Name/Email, Company, Roles, Project Admin, and several icons for access levels. The table lists five members: Rick Nichols (Aesthetik Interiors, Owner), Ben Johnson (General Construction, Construction Manager), b1m360user7@yahoo.com (Ace Property Holdings, Construction Manager), b1m360user6@yahoo.co... (Sparxx Electrical, Engineer), and b1m360user8@yahoo.oc... (General Construction, Superintendent). The 'Project Admin' column shows icons for each member, and the access level icons are shown in the final column.

Name/Email	Company	Roles	Project Admin	Access Level Icons
Rick Nichols	Aesthetik Interiors	Owner	Project Admin icon	Access Level icon
Ben Johnson	General Construction	Construction Manager	Project Admin icon	Access Level icon
b1m360user7@yahoo.com	Ace Property Holdings	Construction Manager	Project Admin icon	Access Level icon
b1m360user6@yahoo.co...	Sparxx Electrical	Engineer	Project Admin icon	Access Level icon
b1m360user8@yahoo.oc...	General Construction	Superintendent	Project Admin icon	Access Level icon

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](#)



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Pype

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EGNYTE

hsbCAD

STRATUS

SITEAWARE

assemble

ManufactOn

triax™

hsbshare

SMARTVID.IO

RM
EX RHUMBIX

HOLO
BUILDER
Winning by Knowing

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INNOVATION IN ALL DIMENSIONS

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BIM 360[™]

bim360.autodesk.com