AUTODESK®
BIM 360™

Project Management

AUTODESK

Introduction

BIM 360 supports project management workflows on the jobsite and in the office. These workflows help to reduce rework by getting critical information into the hands of those in the field by combining mobile technology on the jobsite with cloud-based collaboration and reporting. Essential project management workflows such as RFIs and Submittals are supported, with defined approval workflows between contractors, subcontractors and designers, and the ability to combine submittal items into packages.

The following guide introduces the BIM 360 suggested project management workflows 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 May 2020 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

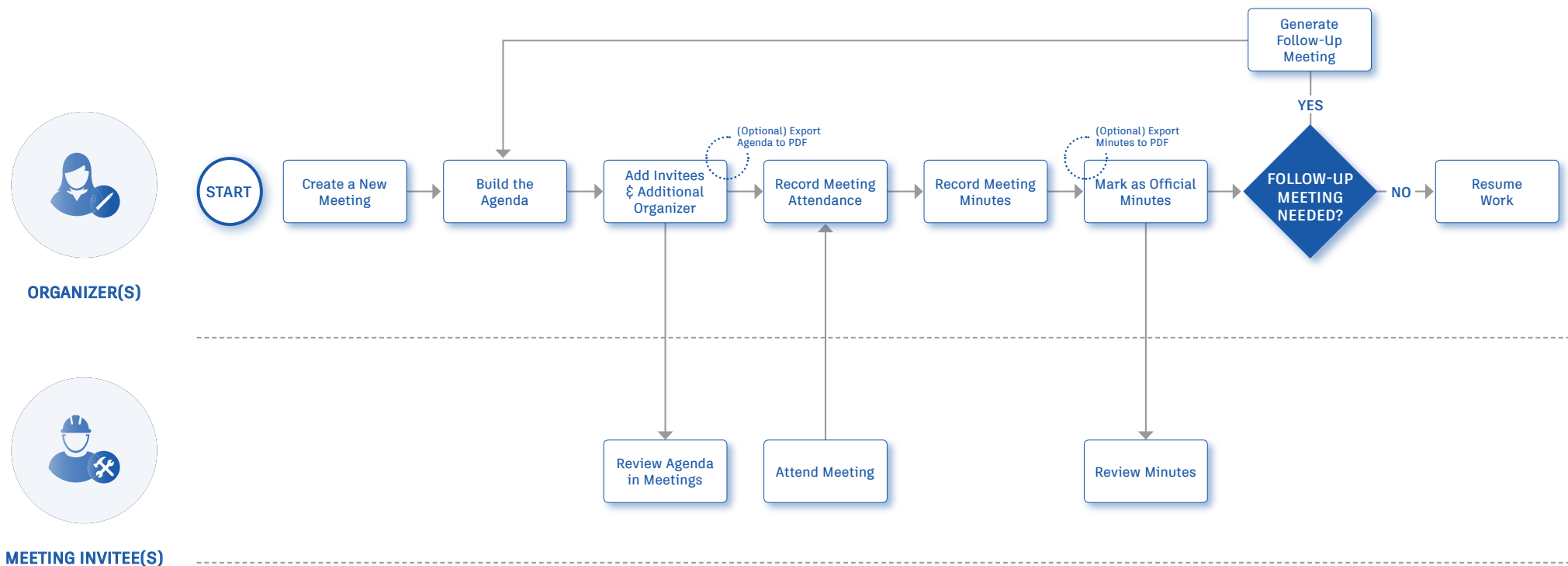# Suggested Workflows

Meeting Minutes Workflow

Make every meeting effortless and productive with clear visibility into the commitments made and an organized history of all meeting records. The graphic below outlines the meeting minutes workflow using BIM 360.

Why follow this workflow?

- Easily create agendas & add meeting invitees.
- Capture decisions made & assign individuals to specific action items.
- Automatically generate follow-up meetings.
- All meeting records are centralized, organized, & accessible to meeting invitees.

BIM 360 capabilities used

- Meeting minute toolset

ORGANIZER(S)

START → Create a New Meeting → Build the Agenda → Add Invitees & Additional Organizer → Record Meeting Attendance → Record Meeting Minutes → Mark as Official Minutes → FOLLOW-UP MEETING NEEDED?

(Optional) Export Agenda to PDF

(Optional) Export Minutes to PDF

Generate Follow-Up Meeting

YES

NO → Resume Work

MEETING INVITEE(S)

Review Agenda in Meetings
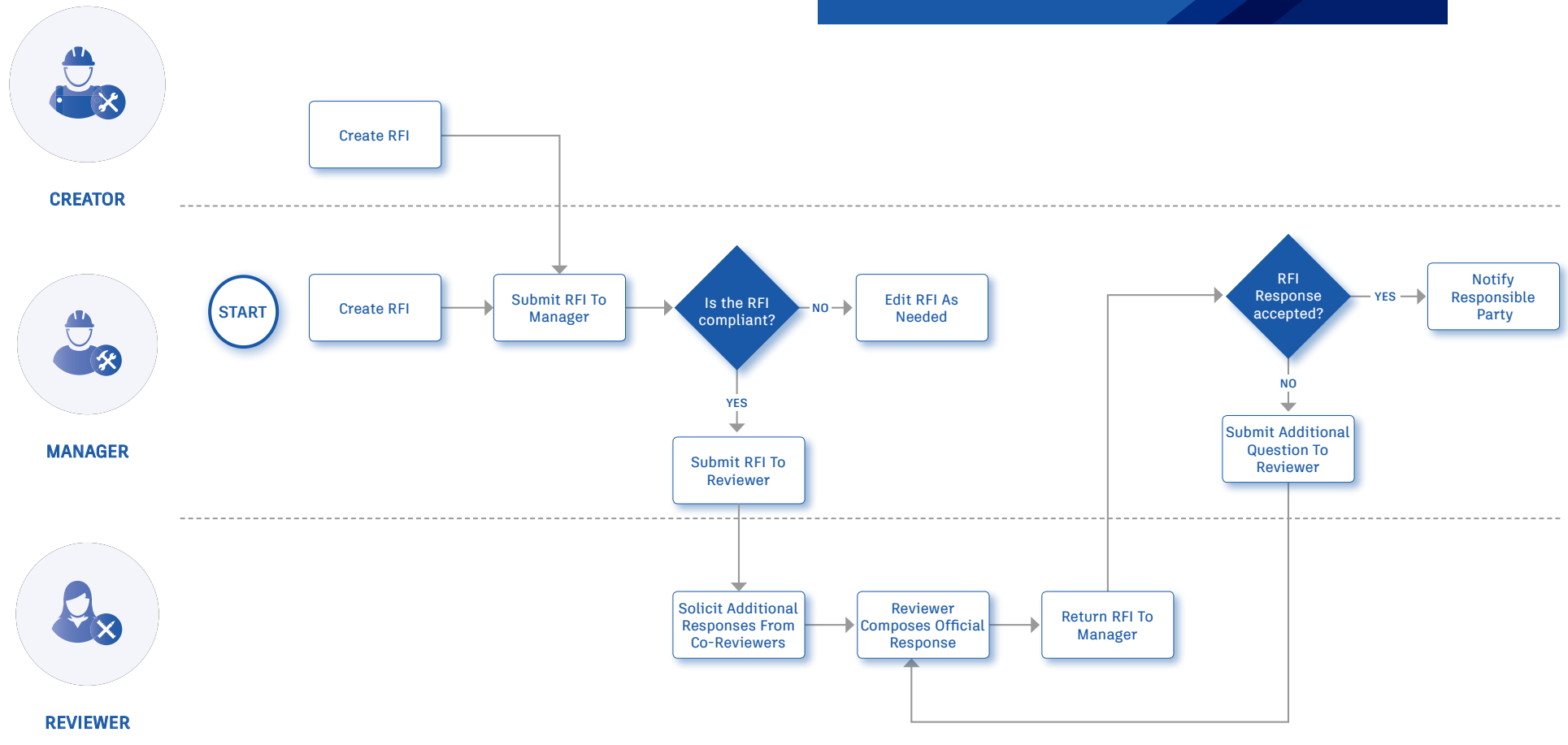
Attend Meeting

Review Minutes

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
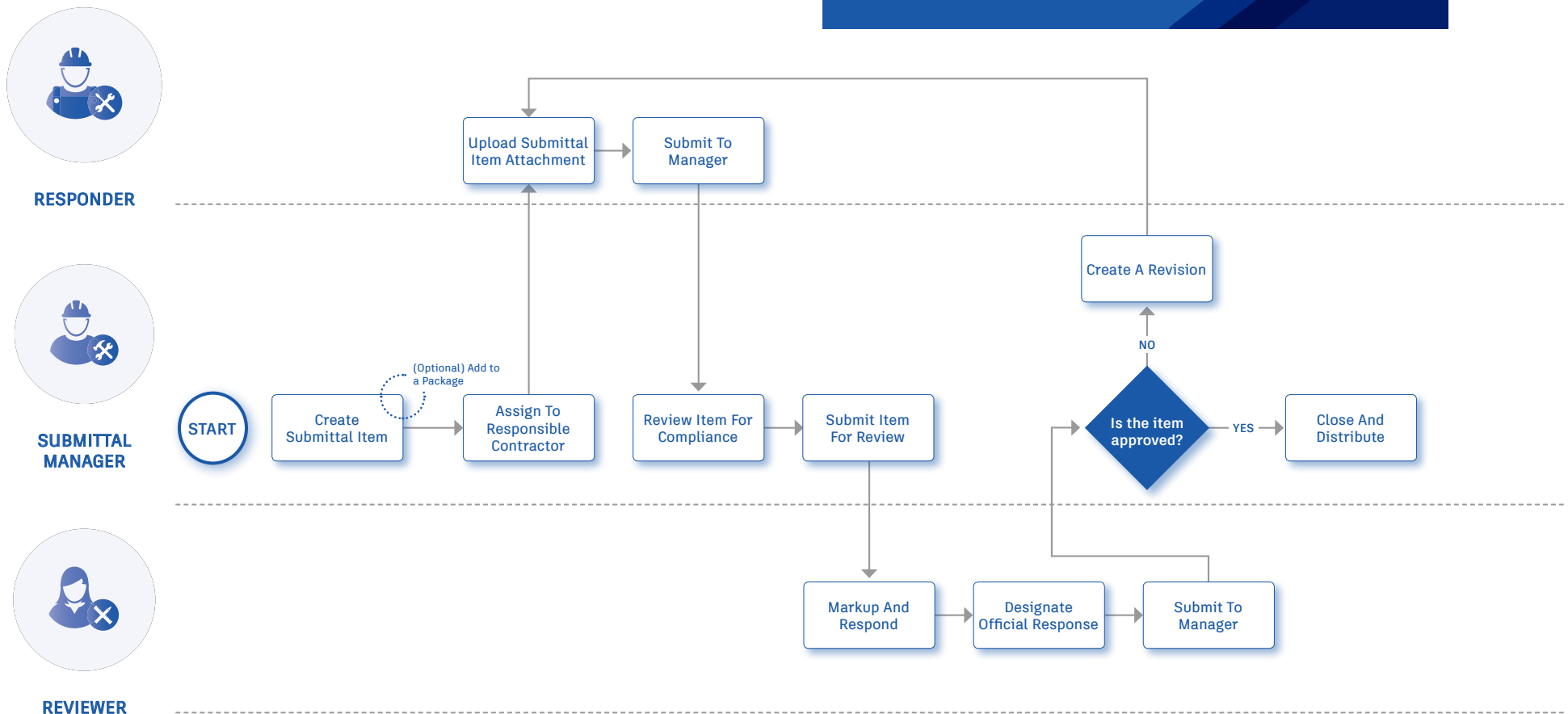
BIM 360 capabilities used

- RFI management

CREATOR

MANAGER

REVIEWER

Create RFI

START → Create RFI → Submit RFI To Manager → Is the RFI compliant?

NO → Edit RFI As Needed

YES → Submit RFI To Reviewer

Solicit Additional Responses From Co-Reviewers → Reviewer Composes Official Response → Return RFI To Manager

RFI Response accepted?

YES → Notify Responsible Party

NO → Submit Additional Question To Reviewer

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?

- Full flexibility to package items as desired
- Easily track & review the status of submittal items
- Distribute & control reviewer privileges

BIM 360 capabilities used

- Submittal management

Project Management Capabilities

Meeting Minutes

No more hunting for lost meeting minutes, questioning accountability, or running the risk of unanswerable claims! With Meetings, a new tab and toolset in the BIM 360 Project Management module, BIM 360 makes meeting management effortless with clear visibility into the commitments made and provides an organized, easily accessible history of all meeting records.

1   Accessing Meetings

- Within the Project Management module select the Meetings tab to access BIM 360's meeting minute toolset.

- In the Meetings list view, you can quickly distinguish between agendas and official minutes via the colored badges. Agendas are orange, and minutes are blue.

- Project Admins have access to view all agendas and minutes.

- Meeting Organizers can only view and edit agendas and minutes they've created.

- Meeting Invitees can only view agendas and minutes they have been invited to.

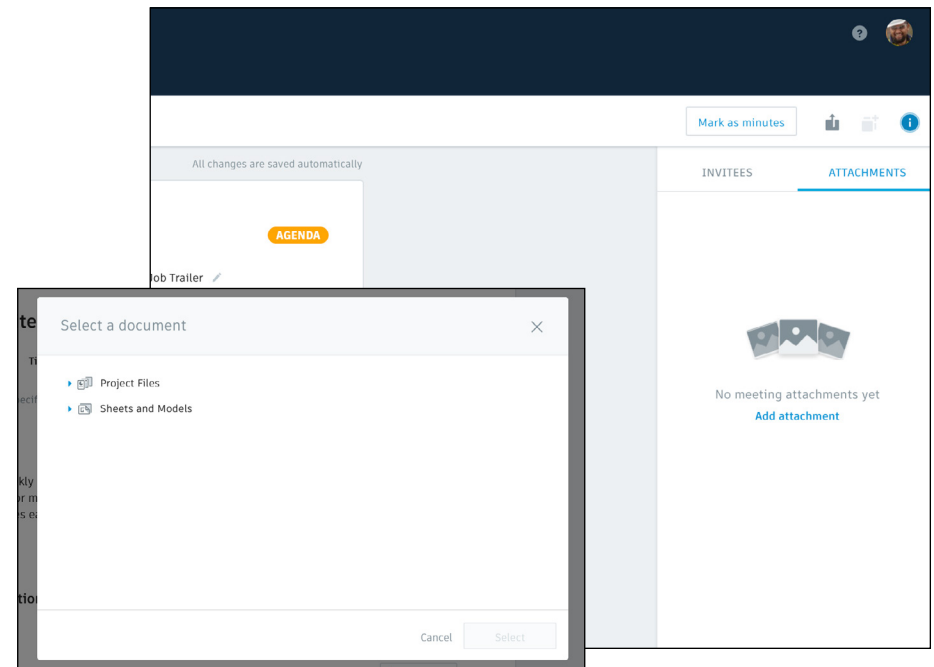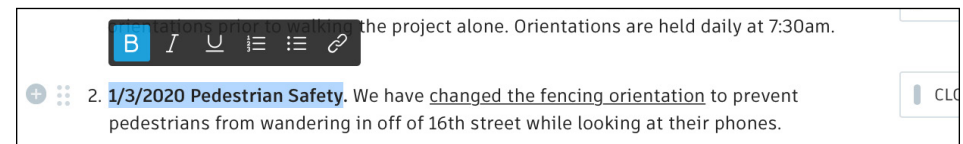- Use the calendar to filter the list by date or range to quickly find the information needed.
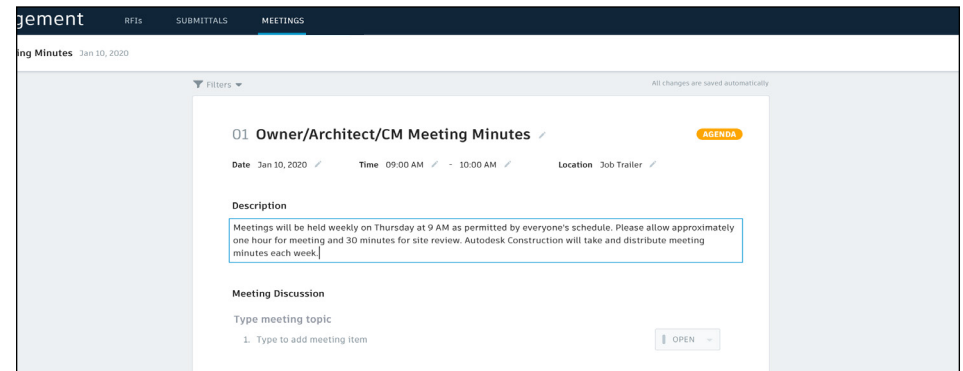
Meeting Minutes

2 | Create a new meeting agenda

- Anyone who has access to the Project Management module has access to the Meetings tab and can create an agenda by selecting the Create New Meeting button in the top right corner. When you create an agenda, you automatically become the Meeting Organizer. As an Organizer you have full control.

- Enter the meeting title, date and time, location, and description. All changes are saved automatically. Note, the meeting title will carry over to any follow-up meetings, and the meeting series will automatically number in sequential order.

- To add the first topic, click, and type within the field where you see "type meeting topic." Hit enter to add.

- Advanced text editing is available to help you emphasize, highlight, and organize key information.

- To delete a topic, hover over the topic and select the "x" on the right-hand side. If you delete a topic, all items under the topic will be removed from the meeting.

- Beneath the topic, you can add multiple items; they will automatically number in sequential order. To remove an item hover over the item and select the "x" on the right-hand side.

- To attach a document, drawing, or model to the meeting record, select "Attachments" in the Invitee panel, then "Add Attachment." In the pop-up window, you can choose a file from your Plans or Project Files folders.

- Attachments are any documents, drawings, or models existing in the BIM 360 Document Management module.

PRO TIP: For a virtual meeting add the join link into the location details.

Meeting Minutes

- To add assignees, due dates, attachments, or link Issues and RFIs to specific meeting items hover to the left of the item name and selecting the plus icon that appears.

- Within the drop-down list, select "Assignee," "Due Date," "Attachment," "Link RFI," or "Link Issue."

- Meeting items can include one or more assignees, attachments, Issues, or RFIs. The list of assignees is limited to the list of meeting invitees.

Liking Issues & RFIs:

- When linking an Issue or RFI, an Add Link window will appear, use the search field to find the item you wish to link quickly.

- Select the item and click "Add" to connect it to the meeting item.

- This process creates a bidirectional relationship between the Issue/RFI and the meeting record This means within the specific Issue or RFI record, the linked meeting item/record is visible.

  PRO TIP: Issue, RFI, and Meeting visibility is base on permissions. If you don't have permission to view the link, it will not appear in the Add Link window or the Issue/RFI record.

Add Assignee: **Add Due Date:**   **Add Issue/RFI Link:**

Meeting Minutes

- To add meeting invitees or additional meeting organizers, select the invitees icons to the right of the mark as minutes button.

- In the Invitees flyout panel, select "add invitees." Use the search field to search by name, email, or company to quickly find the individuals you want to add.

- You can add individuals outside of the BIM 360 project member list by selecting "create non-member" under the search field.

- Adding invitees allows you to track attendance and gives the invitees (only BIM 360 project members) access to the agenda and official minutes from the meeting within the Meetings tab.

- To add a co-organizer(s), select the three dots to the right of the invitees name, then select "make organizer." Organizers have full control.

- To remove an invitee from the list, select the three dots to the right of the invitees name, then select "remove."

- To export the agenda to PDF, select the export icon that is to the right of the invitees icon. Attached documents an linked Issues/RFIs are hyperlinks, making it easy for invitees (who are BIM 360 project members) to access the referenced information.
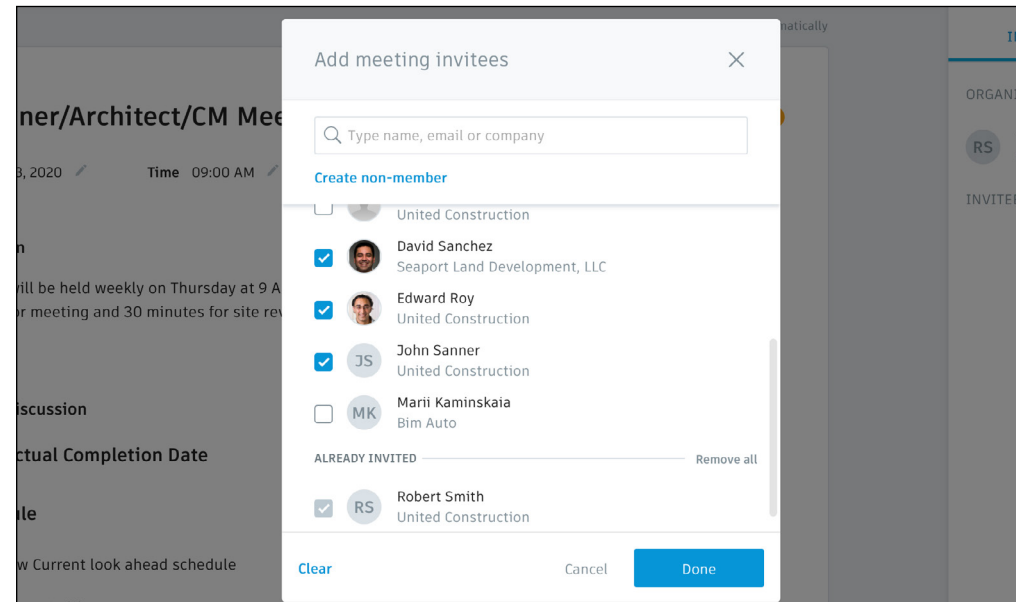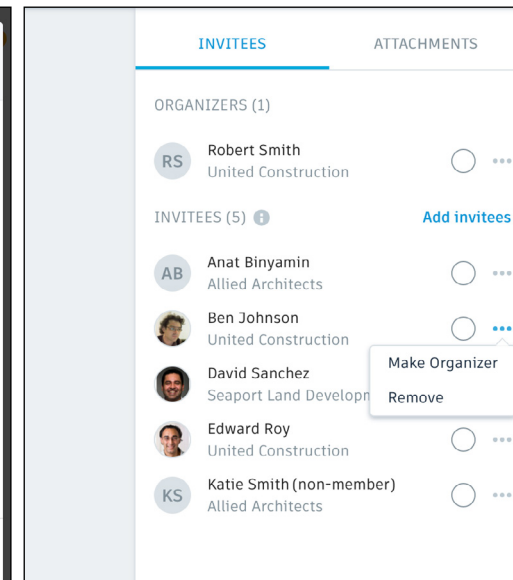

PRO TIP: Emails for non-members can be added at a later date.

Meeting Minutes

3 Capturing Minutes

- The Organizer(s) has full control and are the ones capturing the minutes, add/removing invitees, marking attendance, assigning items, adding due dates etc.

- To mark attendance, select the radio button next to the invitees name. You can also add additional invitees by selecting "Add invitees."

- Similar to creating the agenda, new topics and items can be added/edited during the meeting. To access the assignee and due date options hover to the left of the item name and select the plus icon that appears. An item can include one or more assignees, but the list of assignees is limited to the list of meeting invitees.

- Update the item status from Open to Close using the drop-down list.

- All changes are saved automatically, and invitees can see the current meeting minutes within the Meetings tab in the Project Management module.

- Once the minutes are finalized, select "Mark as minutes." This locks the minutes and converts the state from agenda to minutes; if you need to make a change unlock the minutes by selecting "Mark as minutes" again.

- To export the official minutes to PDF, select the export icon that is to the right of the invitees icon. Any attached documents will be hyperlinked, making it easy for invitees (who are BIM 360 project members) to access the referenced information.
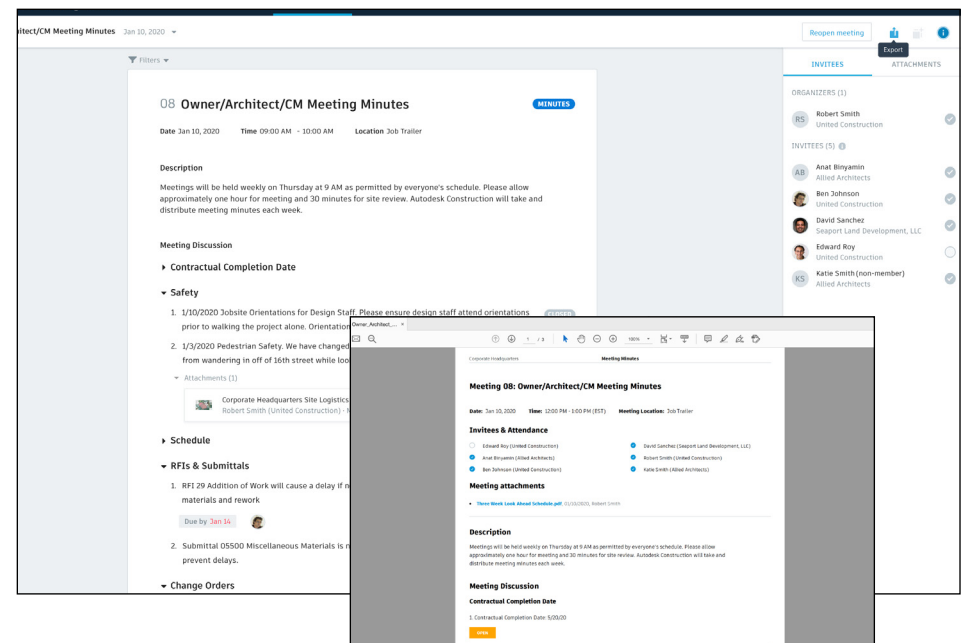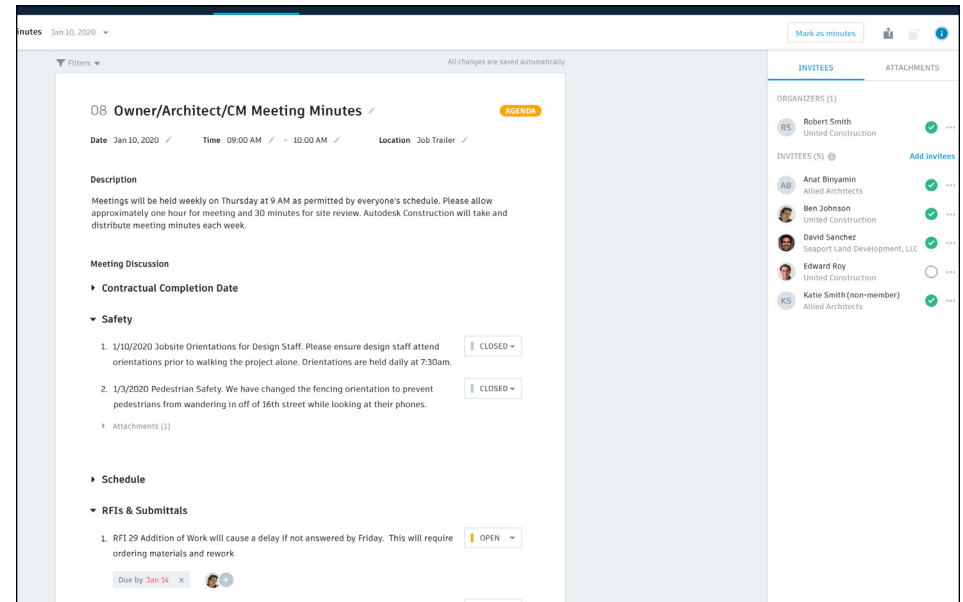
4 | Create a follow-up meeting

- To generate a follow-up meeting, select the follow-up icon that is to the right of the export icon.

- A dialog box will appear informing you the follow-up meeting will copy the current meeting description, open agenda items, invitees, and location. Choose the date for the follow-up meeting via the calendar field and hit "Create."

- As you will see in front of the meeting title, the meeting number has automatically updated and only the open items were carried over.

- Make any necessary updates to the meeting time, location, and description as well as add additional topics and items.

- Review the invitee list and add additional invitees if necessary.

- To export the agenda to PDF, select the export icon that is to the right of the invitees icon.

- To access a previous meeting within the series to the far left of the mark as minutes button, select the drop-down next to the meeting date. Or, within the Meetings tab list view, in the follow-up column, select the icon. A list of all meeting dates within the series will populate, to view the minutes select a date.
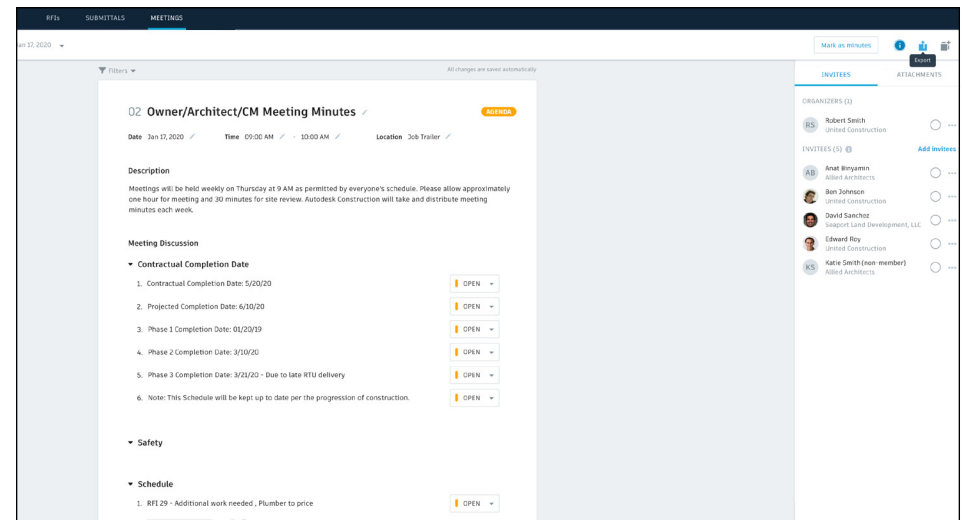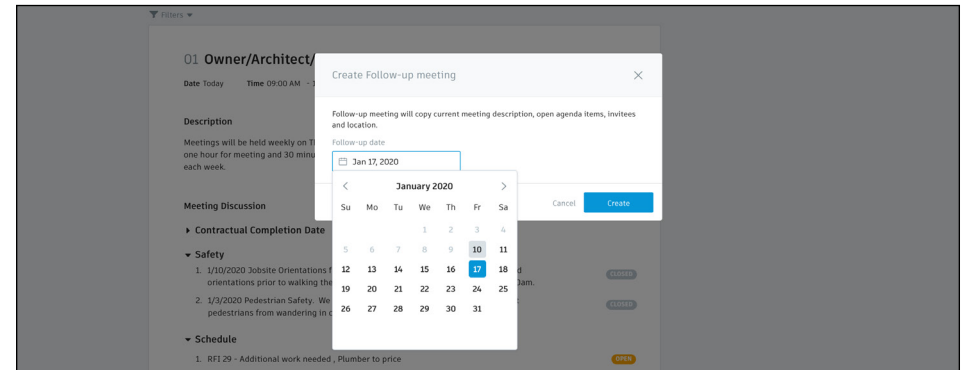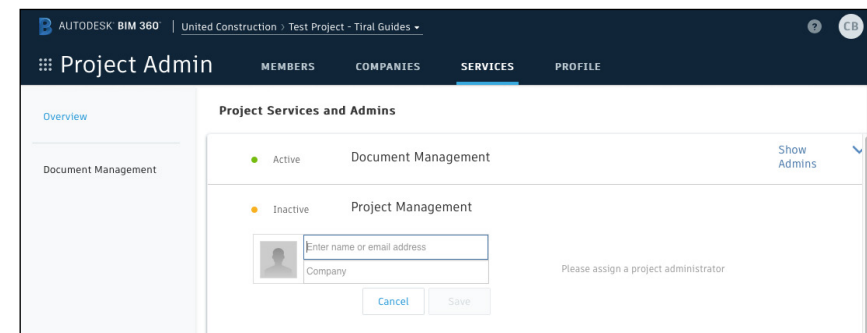
RFI Management

Enhance your RFI workflow and create accountability by designating responsibilities for each step of the RFI process, creating clear accountability, and efficiently moving RFIs through the cycle. From any device, teams can quickly draft a question and initiate the RFI as soon as a discrepancy is found.

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.

2

Setting up the RFI workflow

- In the Project Admin module, select the Services tab.

- On the left sidebar, click "Project Management" then "RFIs."

- In the RFI workflow window select "Change Workflow" to select a workflow. The workflow determines the RFI actions for individual project users.

- With your workflow selected use the drop-downs to assign workflow roles by users, role, or company.
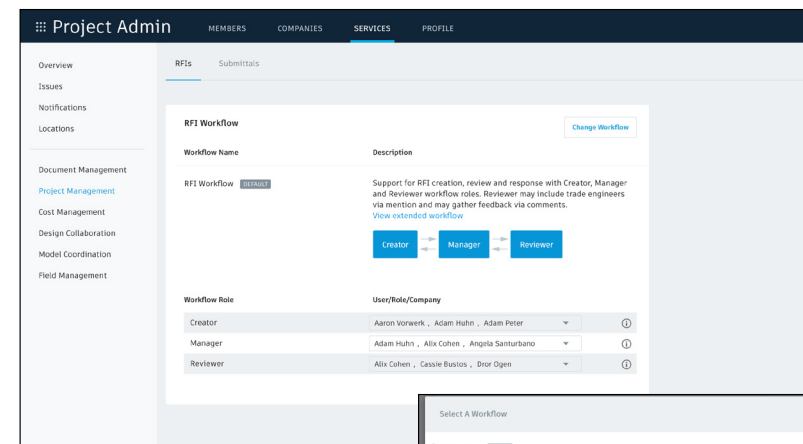
Set Up the RFI Workflow ▶
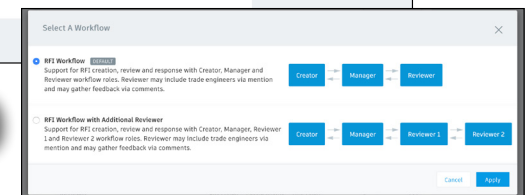
RFI Management

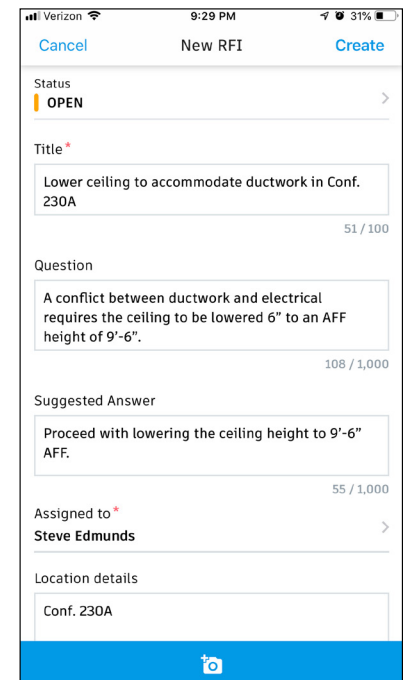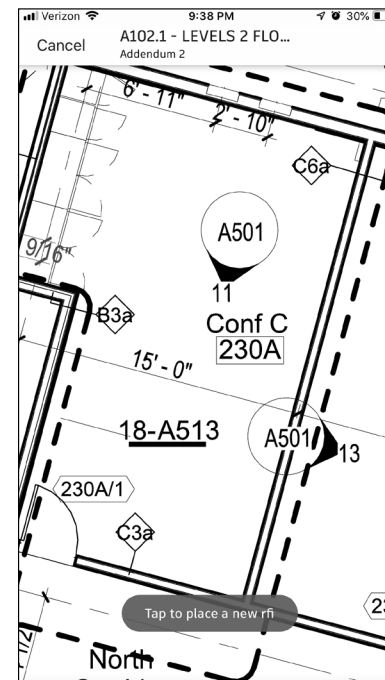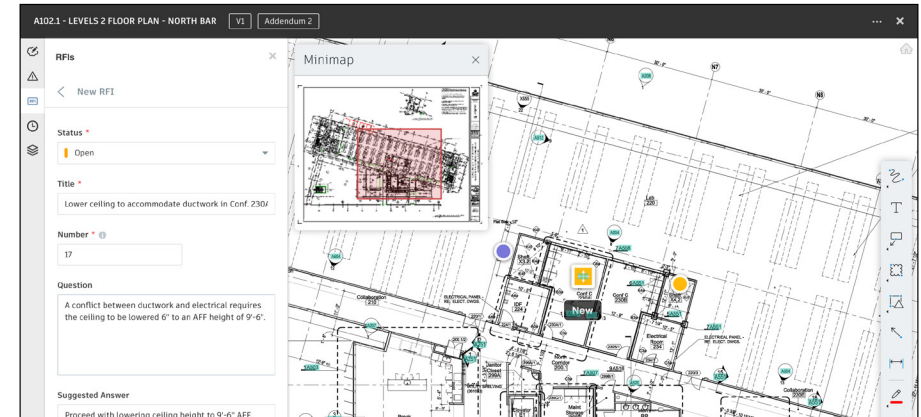**3** ## Creating RFIs associated with a document or model

Only users, roles, or companies assigned to the RFI workflow role "Creator" or "Manager" can create an RFI.

Web:

- In the Document Management module open a document or model.

- On the left side panel select "RFI" to open the RFI panel. At the bottom of the RFI panel select "Create RFI." Click where you want to place the RFI and an RFI push-pin will appear.

- Enter a title and complete all necessary fields such as suggested answer, location, and due date.

- When ready, if you're a "Creator" assign it to the RFI Manager and select "Create." The RFI status will update to Submitted.

- If you're a "Manager" assign it to the Reviewer and select "Create." The RFI status will update to Open.

Mobile (BIM 360 app - iOS & Android):

- In the BIM 360 app open a document or model within the Documents view. Zoom into the location you want to pin the RFI.

- Tap "RFI" on the bottom menu, you'll be prompted to tap to place the new RFI push-pin.

- Enter a title and complete all necessary fields such as suggested answer, location, and due date. Take a photo and attach it to provide more context.

- When ready, if you're a "Creator" assign it to the RFI Manager and select "Create." The RFI status will update to Submitted.

- If you're a "Manager" assign it to the Reviewer and select "Create." The RFI status will update to Open.

- Note: when offline, you can create RFIs, and they will sync once connected back online.

Creating RFIs (web) ▶

PRO TIPS: The RFI number will not appear until the RFI is "Open." The RFI Manager also has the ability to customize the RFI number.

4 ## Creating project-level RFIs

Project-level RFIs are RFIs not associated with a document or model.

Web:

- In the Project Management module, select the RFIs tab and click "Create RFI."

- Enter a title and complete all necessary fields such as suggested answer, location, and due date.

- When ready, if you're a "Creator" assign it to the RFI Manager and select "Create." The RFI status will update to Submitted.

- If you're a "Manager" assign it to the Reviewer and select "Create." The RFI status will update to Open.

Mobile (BIM 360 app - iOS & Android):

- In the BIM 360 app tap the three dots on the bottom menu then "RFI."

- In the RFI screen tap the "+"

- Enter a title and complete all necessary fields such as suggested answer, location, and due date. Take a photo and attach it to provide more context.

- When ready, if you're a "Creator" assign it to the RFI Manager and select "Create." The RFI status will update to Submitted.

- If you're a "Manager" assign it to the Reviewer and select "Create." The RFI status will update to Open.

- Note: when offline, you can create RFIs, and they will sync once connected back online.

RFI Management

5 ## View & edit RFIs

RFIs in submitted, open, answered, rejected and void states are only visible to the Project Admin and the following RFI workflow roles; Creator, Manager, Reviewer, Co-reviewer, Distribution List Members.

Project Admins and RFI Creator or Manager workflow roles can edit RFIs. Creators can edit RFIs in the Draft state. Admins and Managers can edit both Submitted and Open RFIs.

Web:

- View all project-level RFIs in the RFIs tab. Click to open an RFI and use the pencil icon to edit any necessary fields.
- For document or model-based RFIs, 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.
- Editable field have a pencil icon, click the icon to edit. Admins can edit additional fields in a closed RFI and add attachments.

Mobile (BIM 360 app - iOS & Android):

- In the BIM 360 app tap the three dots on the bottom menu then "RFI." Tap to open an RFI and use the pencil icon to edit any necessary fields.
- When viewing a document or model tap the RFI push-pin to open the RFI details. Use the pencil icon to edit any necessary fields.
- Editable field have a pencil icon, click the icon to edit.

Modify RFI Pushpins:

- Admins, Creators, Managers, and Reviewer/Co-reviewers can modify existing RFI pushpins or add pushpins to already created RFI.
- This is done within the RFI record by adding/editing linked documents. When adding a new document, a document viewer will open and prompt you to click a location to place the new RFI pushpin. The activity that takes place is captured in the activity log.
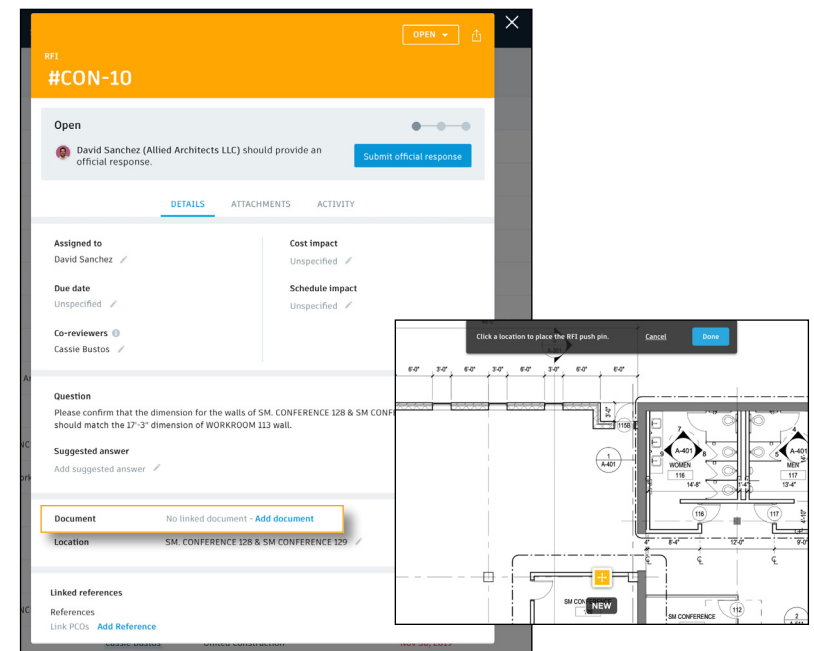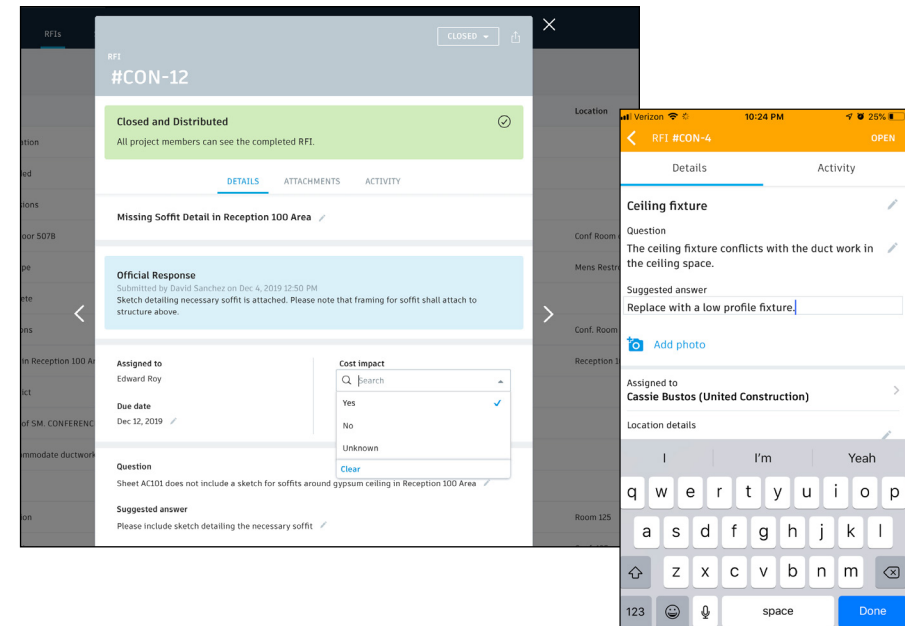
RFI Management

6 | Submit to Reviewer

Only users, roles, or companies assigned to the RFI workflow role "Manager" can review Submitted RFIs and send them to the Reviewer for an official response.

- The RFI Manager immediately receives an email notifying them of the RFI.

- They can review the in-email data or access the RFI directly in BIM 360 by selecting "View RFI" at the bottom of the email.

- The Manager is responsible for reviewing and editing the RFI details and attachments to ensure it's compliant before submitting it to the Reviewer.

- Once the RFI is ready, select "Submit to Reviewer."

- The Manager can then customize RFI number, assign the Reviewer, Co-Reviewers, and select the due date.

- Co-reviewers can contribute information to the response through comments, but cannot add an official response.

- The RFI status will update to Open.

PRO TIP: Project Admins have permission to add a response to an RFI on behalf of a Reviewer. In the activity log, the action will reflect that the Admin "acted on behalf" of the assigned Reviewer.

RFI Management

7 Submitting the official response

Only users, roles, or companies assigned to the RFI workflow role "Reviewer" can submit an official response.

Co-reviewers can contribute information to the response through comments, but cannot add an official response.

- The Reviewer and Co-Reviewers will receive an email notifying them of the RFI.

- They can review the RFI details and collaborate with others via @mentions within the Activity section.

- @mentions tracks communication and notifies individuals via email to ensure nothing slips through the cracks.

- The Reviewer can attach supporting documents within the Attachments tab. They can drag and drop from their desktop or access documents within BIM 360 Docs.

- When ready select "Submit Official Response." Use the status drop down to select Answered, add the official response, then click "Submit."

- If there is an issue with the RFI, the Reviewer can reject it by setting the status to Rejected.

RFI Management

8 Distributing official response

- When the Reviewer submits the official response. The RFI Manager will be notified via email. The Manager is the only role who can close and distribute the response.

- If the answer isn't suitable, the Manager can reopen the RFI and send it back to the Reviewer

- If it is, they can select "Close and Distribute," add comments letting the team know how to proceed, and click to distribute the answered RFI to the entire project team.

9 Re-opening 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

10   RFI to Potential Change Order

BIM 360 Project Management Admins and RFI Managers who have a Cost Management license with full budget permission control can create a Potential Change Order (PCO) from an RFI or link existing RFIs to PCOs.
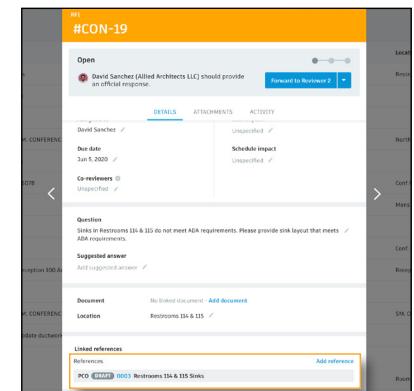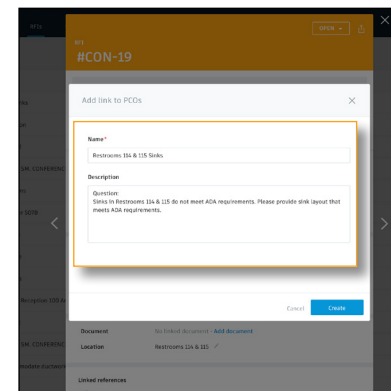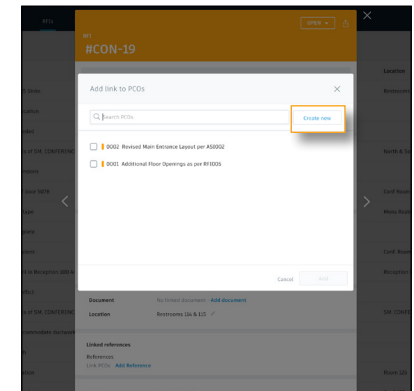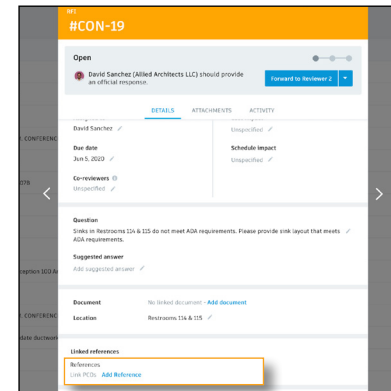
Creating a PCO from an RFI:

- In the Project Management module, open the RFI record. Within the details tab, scroll to linked references and select "Add reference."

- A link PCO box will appear, select the "Create new" button.

- A form will open, fill in the PCO name and description, then select "Create PCO." This information will copy over from the RFI to the PCO, but it can be altered directly in the PCO record.

- Once the PCO is created, a bi-directional relationship between the RFI and PCO is established, and the activity captured in the RFI activity log.

Linking RFIs to PCOs:

- To link RFIs to PCOs follow the same steps as above. However, when the link PCO box appears, simply select the PCO(s) from the list and click "Add."

- To unlink a PCO select the "X" and "Unlink."

Accessing Linked RFIs & PCOs from the list views:

- Only Admins & RFI Managers can view linked PCOs. Within the RFI list view in the linked references column, select the PCO number to open the PCO in the Cost Management module.

- In the Cost Management Module within the PCO details flyout panel, select the RFI to be directed to the RFI in the Project Management module.

RFI List View

PCO Created (Details Flyout Panel)

11   Filter / sort / search RFIs

Web:

- In the Project Management module select the RFI tab. Use the funnel icon to filter, sort by clicking the column headers, and customize the column view via the control icon.

- Use the search bar to search for keywords within an RFI title or question field.

- You can also filter and sort directly from a document or model-based RFI via the RFI panel.

Mobile (BIM 360 iOS app):

- Open a document or model to view all RFIs associated with it. Tap on the pushpin to open the RFI details.

- When searching for a particular RFI use the search field in the RFI list view. The search functionality searches text within the RFI title, ID, question, suggested answer, and official answer.

- To filter use the filter option within the RFI list view.

12   Exporting reports

- In the Project Management module select 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 download a report or share them with team members by clicking the three-dot icon. You can also run and schedule reports directly from the Insight module.

Submittal Management

Submittals are an essential part of any construction project, and effectively organizing and managing your submittals is vital. With the BIM 360 Submittals workflow, you can efficiently create, coordinate, and manage all submittals in a single software. As well as 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 a Project Admin needs to active the Project Management module.

- Click the module selector then "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.

- Now, to identify a Submittal Manager on the left sidebar, select "Project Management" then "Submittals."

- Enter member, company, or role to act as the Submittal Manager.
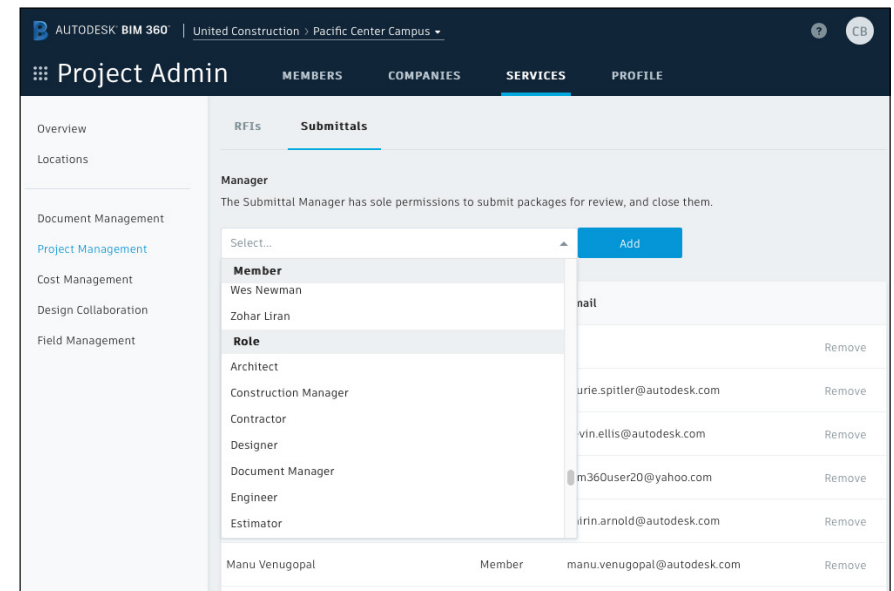
Add a Submittal Manager ▶

Submittal Management

2 Creating submittal items
(Submittal Manager)

- In the Project Management module, select the Submittals tab. Within the Items tab, you can manually create Items by selecting "Create new item." Submittal Managers can import a list of Items using the import button. When importing auto assign Submittal participants by including the Manager, Reviewer, Co-Reviewers, Responsible Contractor, and distribution list members in the excel import file.

Enter all necessary information, including:

- **Spec Section:** Select a spec section or create a new one.
- **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.
- **Dates:** To track items more efficiently, fill in the dates within the tracking section.

PRO TIP: If you need to create multiple items, check the "create another" check-box to save you from clicking the "create new item" button each time.

Creating Submittal Items ▶   Importing Submittal Items ▶

3 Creating spec sections
(Submittal Manager)

- You can create a spec section when entering a new submittal item by clicking "Create New" above the "Spec Section" drop-down list.
- Or, in the Submittals tab, select "Spec Section" then "Create spec section."
- Enter the spec number and title, then click "Create."

Submittal Management

4 ## Creating submittal packages
(Submittal Manager)

- Admins and Submittal Managers can create and delete packages in the "Packages" tab.

- To create a package select "Create new package," fill in the spec section and package title, then select "Create."

PRO TIP: If you need to create multiple packages, check the "create another" check-box to save you from clicking the "create new package" button each time.

5 ## Adding submittal items to package
(Submittal Manager)

- Adding items to packages is optional and can be done when the item is in any state within the workflow.

- There are two ways you can add items to packages.

  - **From the Packages tab:** In the "Packages" tab, open the package you want to add the item(s) to. If the package is empty, select the blue "Add items" button. If the package contains items, there will be an add items link under the last package. In the pop-up box, use the search field or scroll to find the items you want to add, check the box and select "Done" to add them to the package.

  - **At the Item Level:** Open the Item and in the Overview or Details tab select the pencil icon next to "Package." A drop-down list will appear, search for the package you want to add the Item to.

Submittal Management

6 Submitting documents
(Responsible Contractor)

- The Responsible Contractor will be notified of the submittal item via email.

- Open the item, review the details and in "Attachments" upload the necessary documents.

- Once attached, the document will appear. Make sure the "For review" box is checked.

- Select "Submit to Manager."

- The Submittal Manager can now send the item to the Reviewer.

7 Submitting item for review
(Submittal Manager)

- Open the item and review the attachments.

- If changes need to be made return the item to the Responsible Contractor. If no changes are needed proceed by selecting "Submit to Reviewer."

- Select the reviewer, add co-reviewers, due date, distribution list members and note if needed.

PRO TIP: If you need to send the item back to the Responsible Contractor select the arrow next to "Submit for Review."

Submittal Management

8 Reviewing submittal item
(Reviewer)

- The Reviewer and Co-reviewers will be notified of the submittal item via email. Click to open the item and review the attached documents within "Attachments."

- Designate official response using the drop-down list at the top.

- If approved, select the official response attachments and click "Done."

- To send the item back to the Submittal Manager select "Return to Manager."

PRO TIP: Admins have permission to act on behalf of Reviewers in the Submittal module providing teams with the flexibility of process while allowing the correct Reviewer to be displayed in the Reviewer field and reports. The activity log will show the Admin logged the response.

9 Distributing official item
(Submittal Manager)

- Once the item is approved by the Reviewer, the Submittal Manager needs to close it and distribute it to the Responsible Contractor.

- Open the item and select "Close and Distribute."

- Include the Responsible Contractor and in the distribution list identify team members who should be aware of the approved submittal item via email.

- Once the item is closed (approved) it will be available for viewing by all project members.

PRO TIP: Admins and Submittal Managers can re-open closed items. With the closed item open, select the arrow next to the "Closed" button in the top right corner, then select "Open." The item will be re-opened to its latest state and sent to the Manager. Managers and Admins can send it to a Reviewer or close and distribute it.

Submittal Management

10 Creating a revision
(Submittal Manager)

- If a Reviewer responds to a submittal item with "Revise and Resubmit" or "Rejected," the Submittal Manager needs to create a revision.

- The Submittal Manager needs to open the submittal package and select "Create new revision."

- Include the Responsible Contractor, due date, and note.

- Select "Done" to send the item back to the Responsible Contractor.
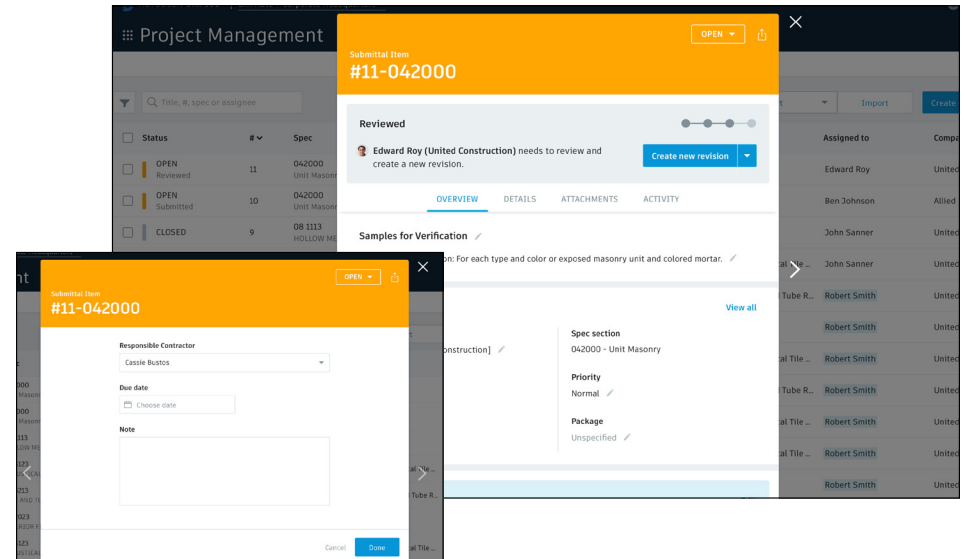
11 Responding to a revision
### (Responsible Contractor)

- The Responsible Contractor will be notified of the revision request via email.

- Open the item, and in "Attachments" upload the revised documents.

- Once attached, the document will appear above the Revision 0 section. Make sure the "For review" box is checked.

- Select "Submit to Manager." The Submittal Manager can now send the revised item(s) to the Reviewer.
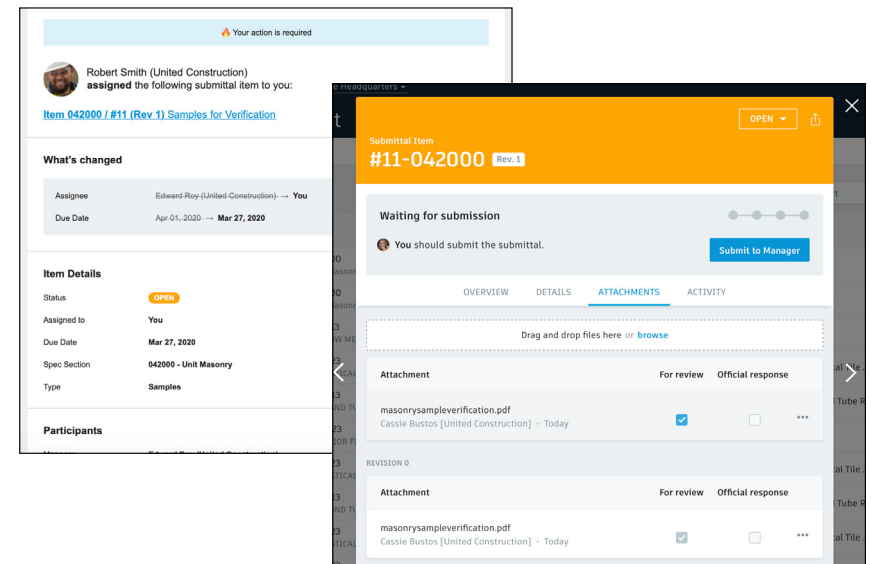
Submittal Management

12   Workflow date tracking

- As submittal items move through the workflow (forward and backward), the system automatically tracks transition dates.

- The tracking dates are visible in the details section of the Submittal Item and display in the columns within the Item list view.

- Dates pull in summary XLSX export as well as a calculated days difference column.

- Admins and Submittal Managers have permission to override the tracking dates.
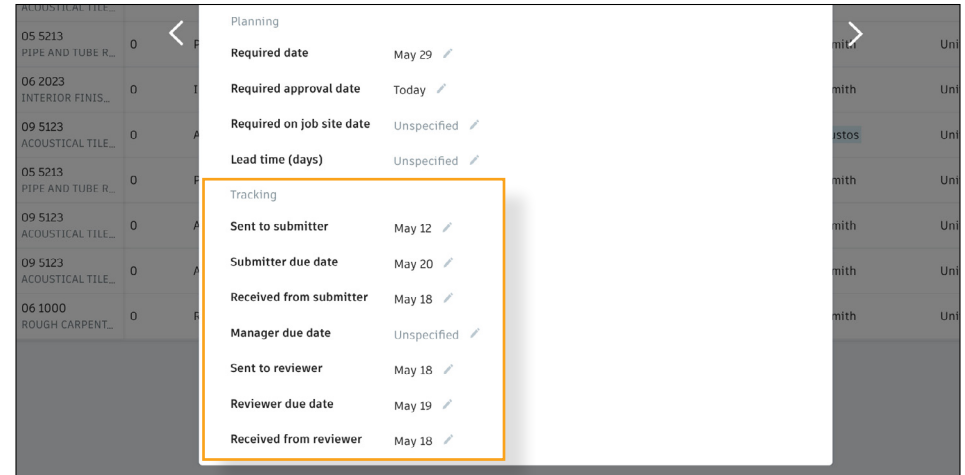
13   Viewing submittals on mobile

BIM 360 App:

- Within the BIM 360 app, team members can access a list of Submittal items via the More menu.

- All approved submittal items are accessible to the entire project team. Submittal items in progress are only available to those involved in the submittal process.

- Tap to open an item and reference the details. Tap the download icon to sync attachments for offline viewing.
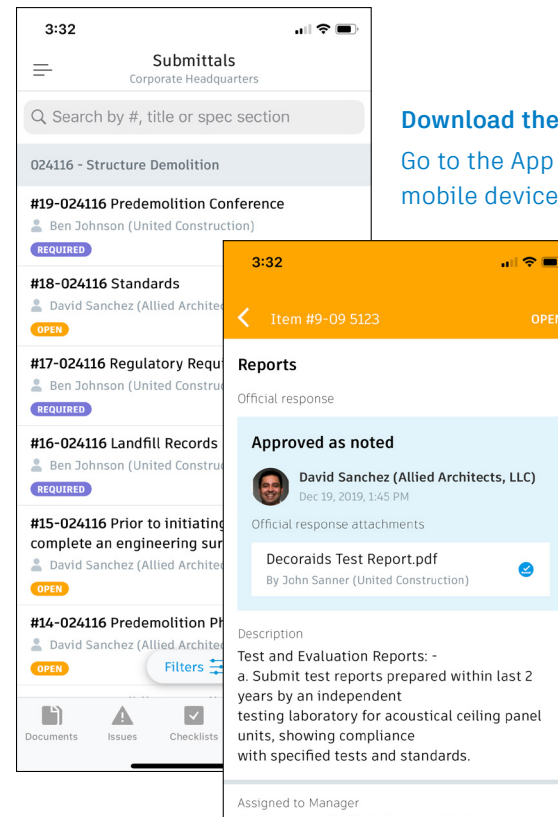
Download the BIM 360 App:

Go to the App Store or Google Play Store on your mobile device to download the BIM 360 app.

Get the iOS App

Get the Android App
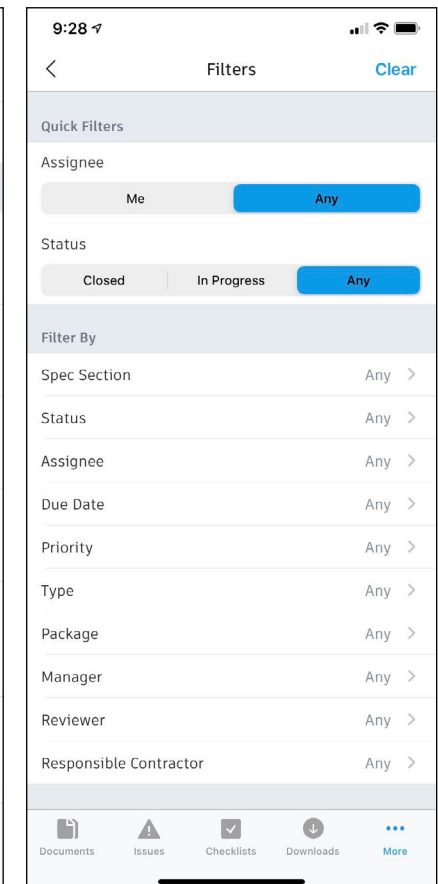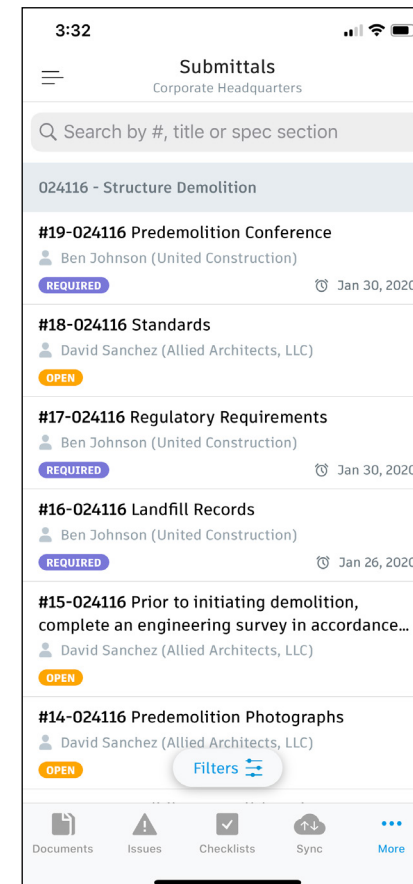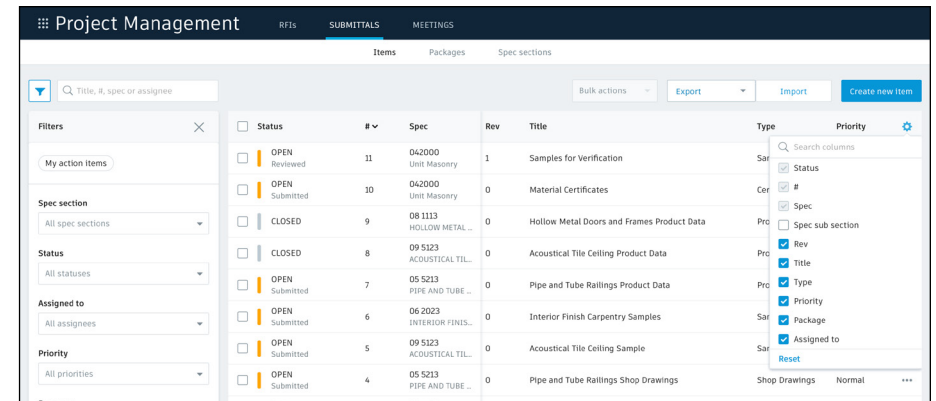
Submittal Management

14 Filter / sort / search submittals

Web:

- In the Project Management module select the Submittals tab.
- Within either the Items or Packages tab, select the funnel icon to access the filter options.
- To sort, click the column headers. To customize the columns within the Items list view, select the control icon, then check the items you wish to see.
- To search use the search bar.

Mobile:

- The filter and search functionality is currently only available on iOS.
- To filter within the submittals list on mobile select Filters. Use the quick filters or filter by spec section, status, assignee, due date, priority, type, package, manager, reviewer, or responsible contractor.
- When searching for a particular submittal item use the search field. The search functionality searches by submittal number, title, or spec section.

Submittal Management

15 | Exporting reports

- In the Project Management module select Submittals.

- To export a PDF report or Excel export of all items, select the Items tab, then click the export button (only available to Admins and Submittal Managers).

- To export a detailed PDF report of an individual item, open the item, then click the export button.

- To export a PDF report of a package, select the Packages tab, open the package, then click the export button (only available to Admins and Submittal Managers).

- Use the reports tab in the Insight module to access all exported submittal item summary and detailed reports. You can download a report or share them with team members by clicking the three-dot icon. You can also run and schedule reports directly from the Insight module.

Prediction & Analytics Capabilities

Prediction & Analytics

At its core, BIM 360 is built to help construction teams better visualize and take daily action to minimize project risk. Whether it is risk associated with safety, quality, or project controls, BIM 360 allows teams to streamline workflows to improve project outcomes.

The prediction and analytics ecosystem enhances the BIM 360 platform with a deeper understanding of project performance, prioritized daily activities, and instant visibility into project risk, giving teams the information they need to avoid costly mistakes and further improve risk mitigation.

1   Project Home

- Project members can see a snapshot of a real-time "to do" list as well as leverage risk prediction assistance through the Project Home module.

- Dashboard cards can be personalized depending on your project role by selecting "Customize" on the top left and clicking on the "Card Library."

- Click any of the links to drill down and get more information on a specific item and take immediate action.

- Use the expand arrows to open the card to full screen to see more information.

PRO TIP: Interact with your projects plans or models through the Project Design card. This card allows you to markup or create and view issues from directly inside the card view and it integrates back to the original file in Document Management.
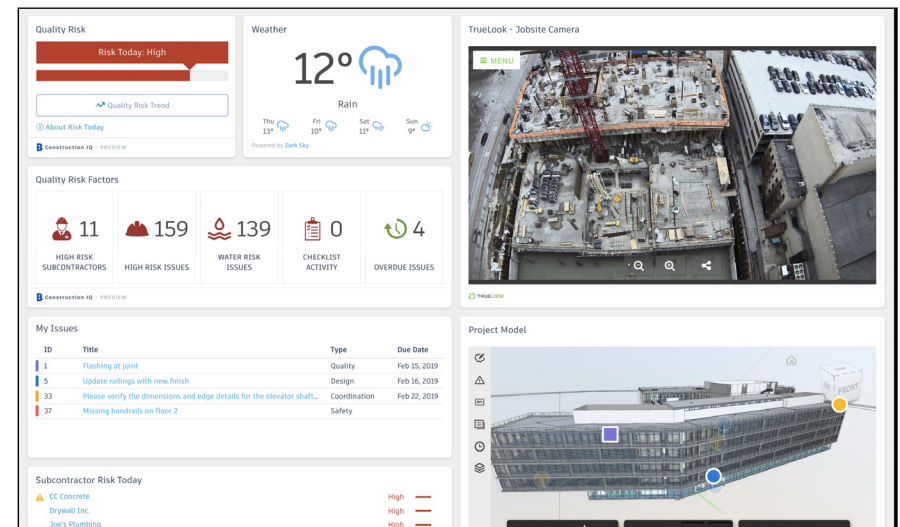

Project Home Overview

Project Home Blog Post

Prediction & Analytics

2 Card Library & Partner Cards

- The Card Library gives users the ability to show information that is personalized for them.

- Click on the "Customize" icon on the top left to see a view of the Card Library.

- Filter, view, and select cards to be added to your dashboard.

  - Filter by Partner Cards to add data from any of the selected integration partners filter for a single view of all project information.

  - To view and add Construction IQ specific cards filter by Construction IQ.
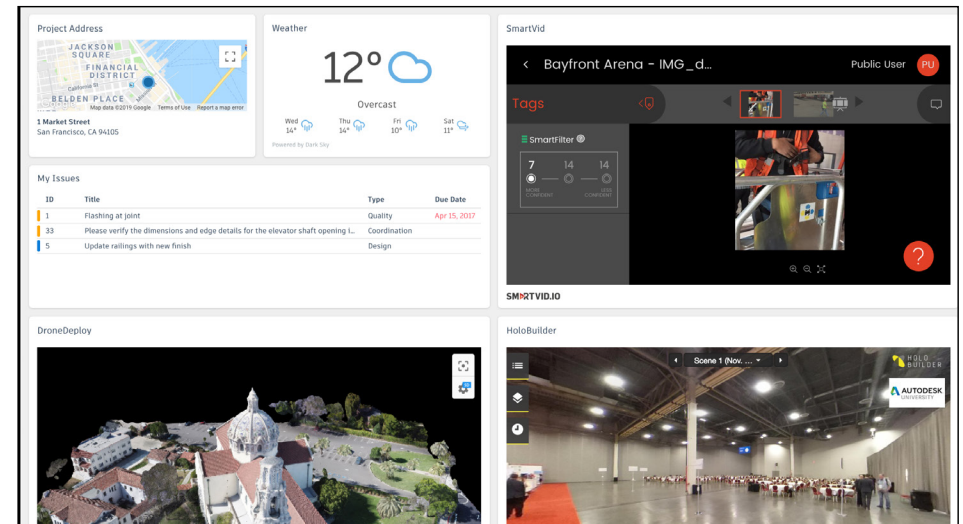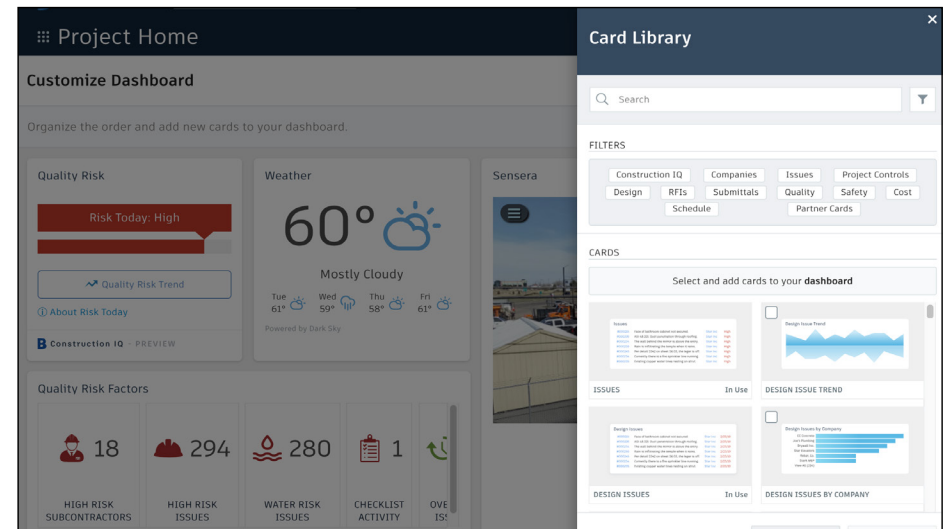
Partner Cards

Prediction & Analytics

3 Quality Analytics

- BIM 360 helps predict quality related issues by visualizing high risk areas through Construction IQ and providing visibility to project data.

- Quality data is visualized on the Quality tab within the Insight module as well as through select cards in the Card Library in Project Home.

- The Risk Tab in the Insight module shows a summary of subcontractors who have the highest risk based on outstanding issues, a list of high risk issues, water related risk issues, checklist activity, and overdue Issues.

- Click on each of these quality risk factors to drill down and get more detail.

Insights Setup   **Insight Blog**
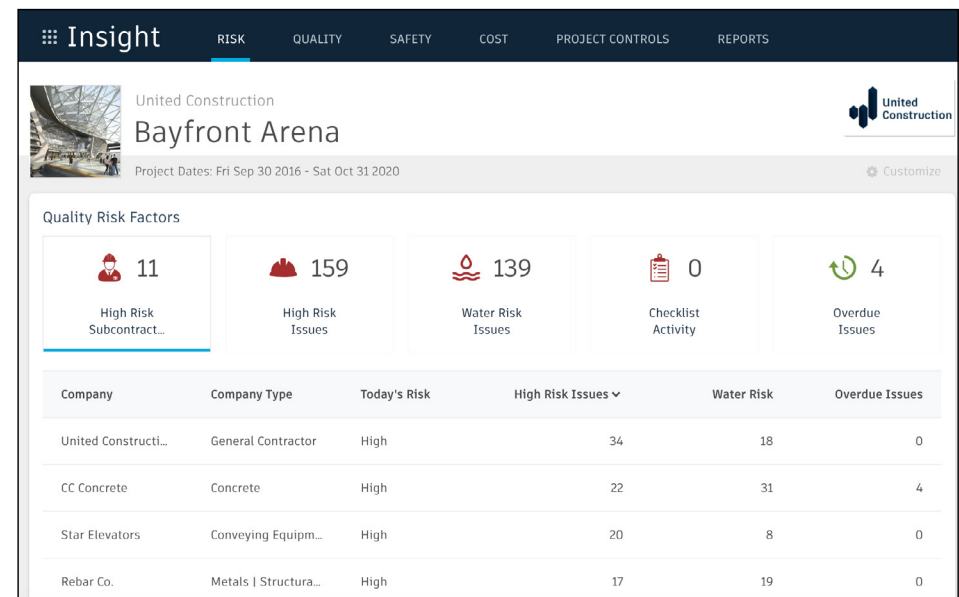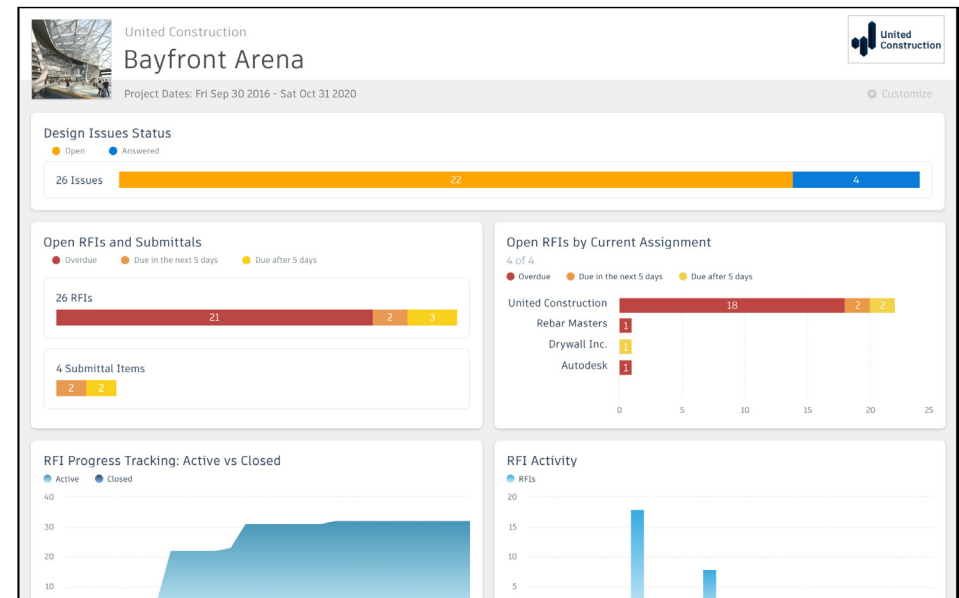
Prediction & Analytics

4 Safety Analytics

- BIM 360 tracks safety related data like near misses and at-risk behaviors through logged Issues, RFIs, Checklist items, etc.

- Construction IQ analyzes this data as leading indicators and helps predict safety issues before they become serious incidents.

- Data is visualized on the Safety tab within the Insight module as well as through select cards in the Card Library in Project Home.

- Integration Partner Cards also show safety related data insights through site cameras or their own AI based technology.

- **Highlighted Safety Cards:**
    - **Housekeeping Issues** - many safety incidents can be avoided by keeping a clean jobsite.
    - **Fatal Four Safety Issues** - 60% of all construction deaths are due to one of these four issues; fall, caught between, electrocution, struck by. See jobsite Issues that fall into these categories.
    - **Subcontractor Safety Risk** - highlights subcontractors that have issues relating to the "fatal four."
    - **Subcontractor Risk Summary** - shows subcontractors with the highest risk and drill down to see what those Issues are.
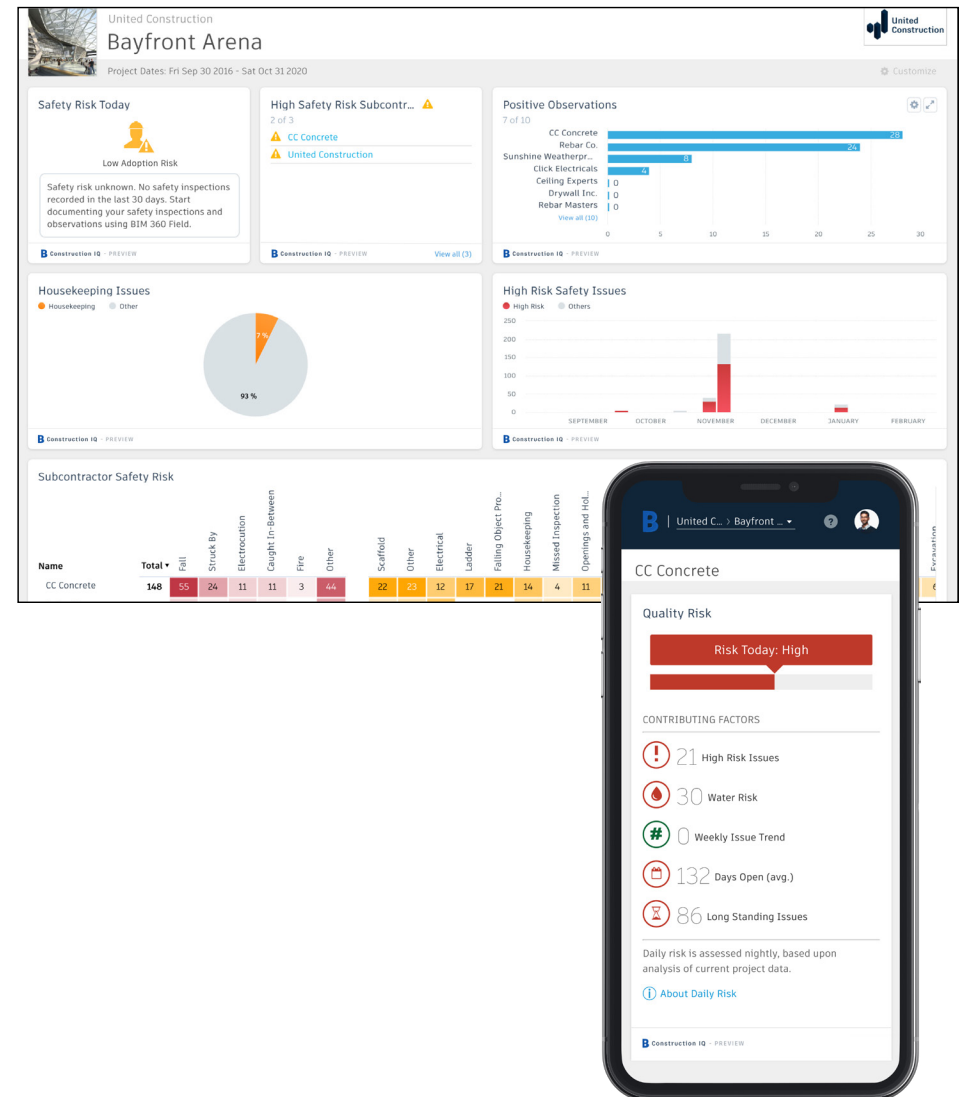
Prediction & Analytics

5 Design Analytics

- BIM 360 surfaces design issues through the Design tab in the Insight module

- Through this tab, users get visibility into key design issues and take immediate action to resolve.

- Design Review Risk Factor Card:
  - Powered by Construction IQ
  - Surfaces code compliance design issues
  - Identifies design issues that involve critical building components
  - Highlights documentation errors and omissions
  - Highlights overdue issues and reviews as well as who is responsible

- Approval Reviews by Current Assignment Card:
  - Highlights the status of design reviews by company

Design Risk Blog

Design Risk Demo Video
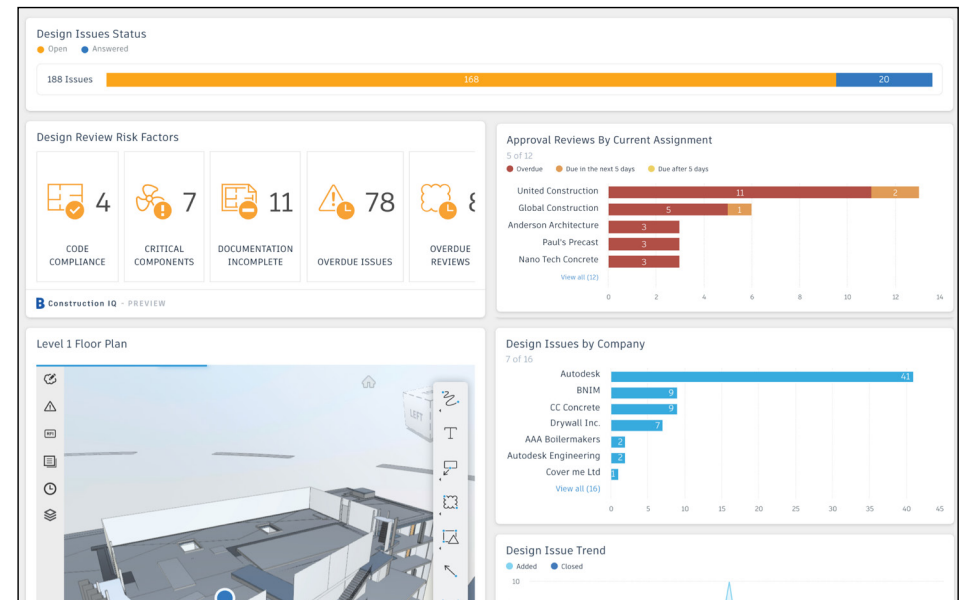
Prediction & Analytics

6 Project Controls Analytics

- The Project Controls tab in the Insight module gives visibility into managing a projects RFIs and Submittals as well as oversight of any Design Issues.

- **Highlighted Project Control Cards:**
  - **Open RFIs and Submittals** - gives a summary of the number of overdue as well as upcoming RFIs and Submittals.
  - **Open RFIs by Current Assignment** - shows a list of subcontractors and how many overdue and upcoming RFIs they have.
  - **Design Issues** - shows a summary of open Issues that are design related as well as the number of answered Issues.

- Click on each of these cards to drill down and get more detail.
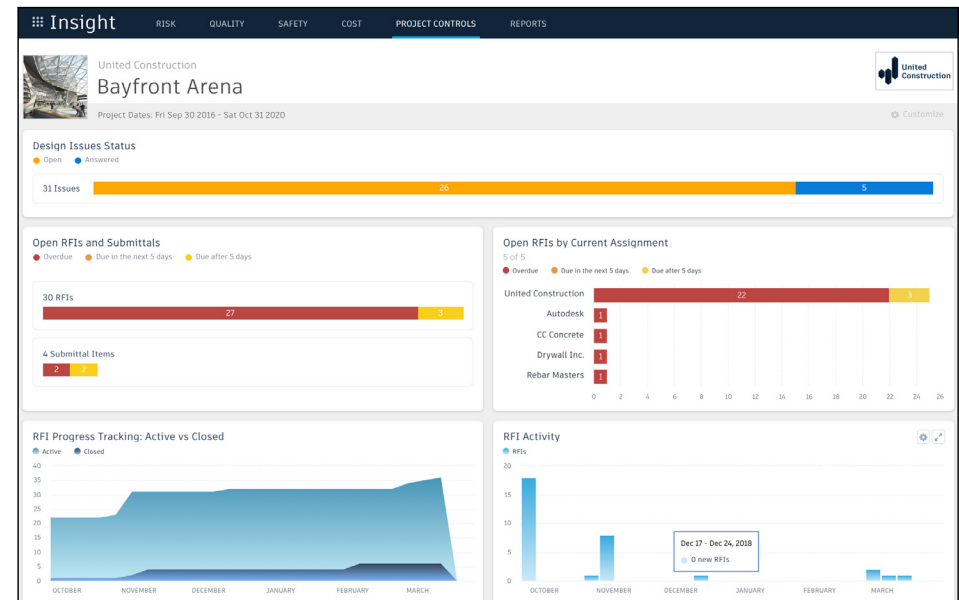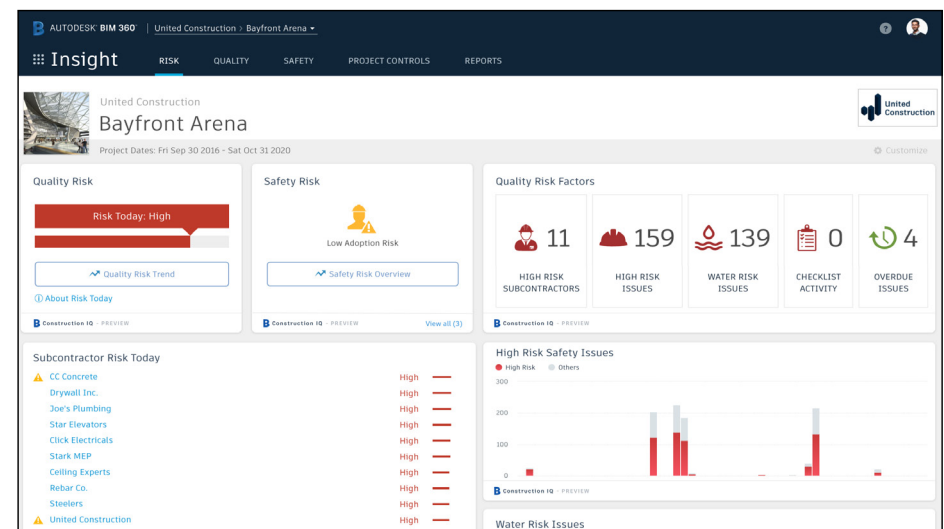
Prediction & Analytics

7 Reporting

- The Report tab within the Insight module shows an aggregated list of generated reports related to Issues, Checklists, Documents, Submittals, and RFIs.

- Filter reports based on type, date, or creator.

- Download or share reports with other team members.

- Create and schedule reports based on your filter criteria.
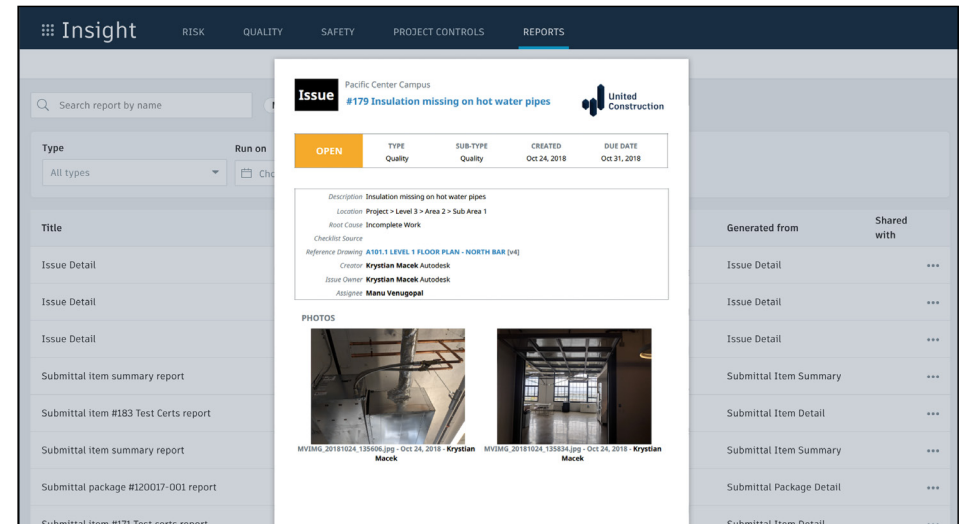
8 Construction IQ

- Construction IQ is a built-in machine learning and AI functionality that leverages data across the entire BIM 360 platform.

- Construction IQ sifts through millions of data points from your construction documents, issues, checklists, related meta-data and historical data, and analyzes it to identify and prioritize risks.

- Construction IQ automatically classifies items and flag issues as "High Risk."

- "High Risk" issues are items that if left open, will likely lead to bigger more costly issues down the road.

  - EXAMPLE: if flashing was marked as missing on a window, the Issue would be flagged as "High Risk" to avoid bigger water leaking Issues.

- View Construction IQ data through the "Risk" tab within the Insight module as well as by selecting cards tagged as "Construction IQ" in the Card Library.

About Construction IQ

Prediction & Analytics Blog

Prediction & Analytics

9 Executive Insight

- With the ability to view company-wide performance data across multiple project, executives and cross-project leaders can make more informed business decisions and gain visibility into overall risk assessment for current as well as future projects.

- Invite users with "executive overview" permission to access this view. This is a separate Insight view geared towards Executives and cross project leaders only.

- **View cross project health across tabs:**
    - **Risk** - shows projects with higher risk scores based on project data and Construction IQ capabilities.
    - **Quality** - overview of quality related checklist activity and conformance.
    - **Safety** - overview by project of safety related issues.

PRO TIP: Through the Risk tab in the Insight module, executives can get instant visibility into which projects have the highest risk levels each day. Assess the project risk overtime to see which projects remained in a "high risk" category over longer periods to determine which projects need executive level support.
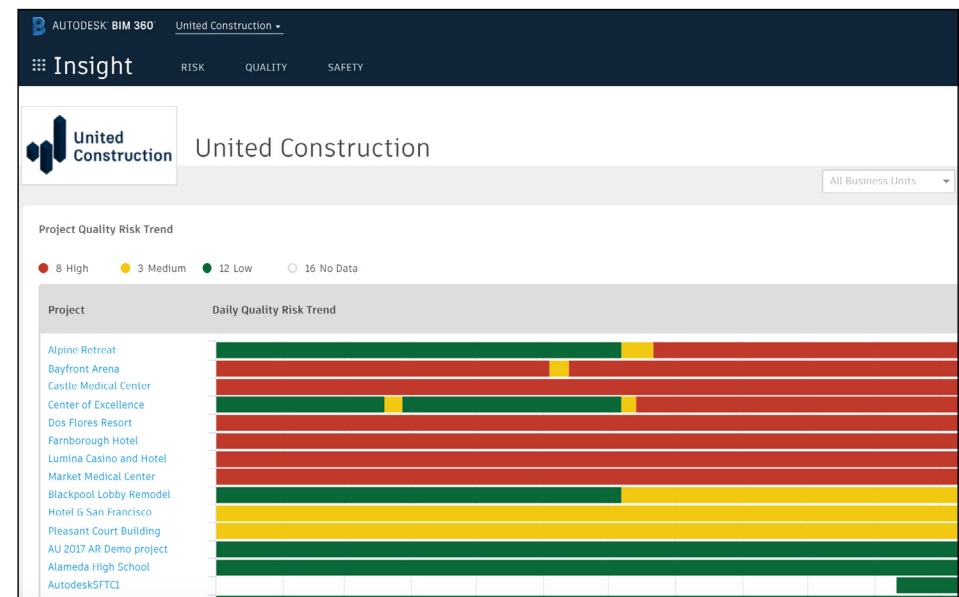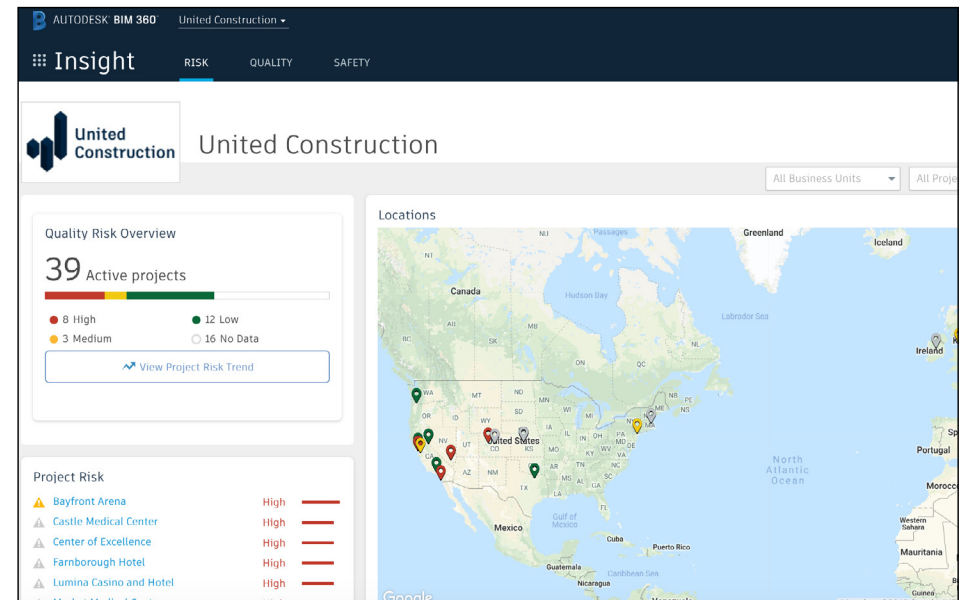
Additional Capabilities

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

Oakwood Medical

Project name is valid.

* Project Type

Hospital

Project Image

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

Browse

Construction Type

New Construction

Project Address

560 Dockside Avenue

* Project Value

87000000   USD

Project value is valid.

Address Line 2

Boston   Postal Code

Massachusetts

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).

Members & Access Levels   Setup Roles

PRO TIP: You can choose from a list of preset roles or create your own custom roles as well as configure the permission and access levels by each role.

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.
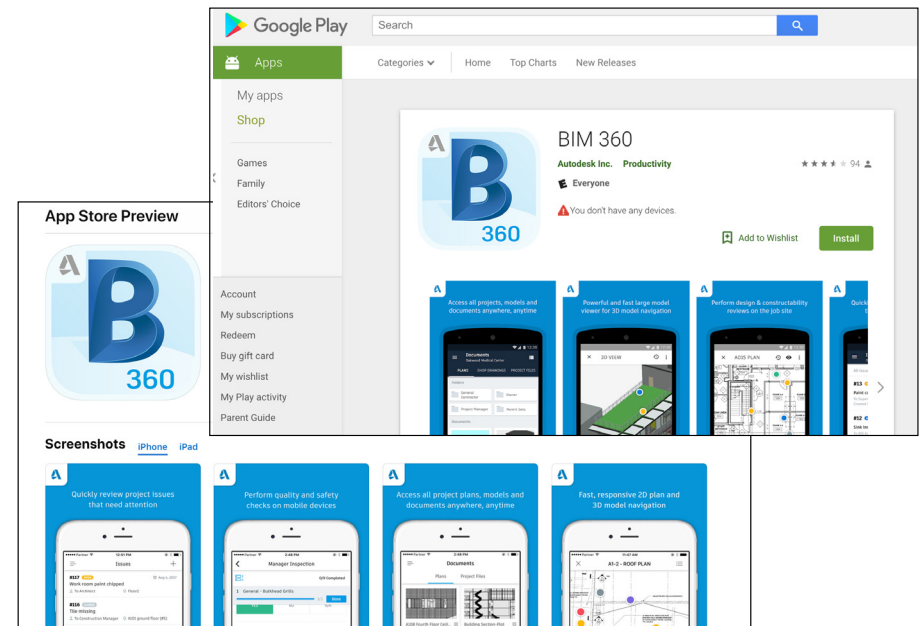
1 Download the BIM 360 app

- 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.
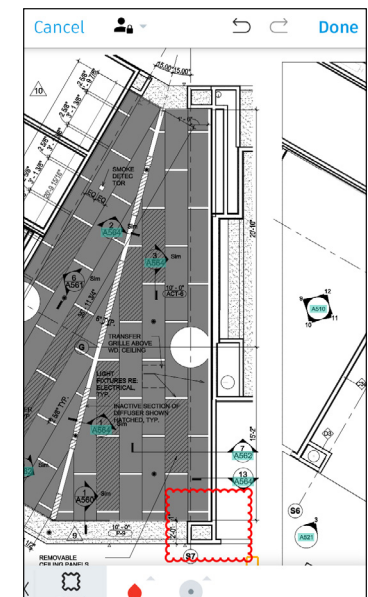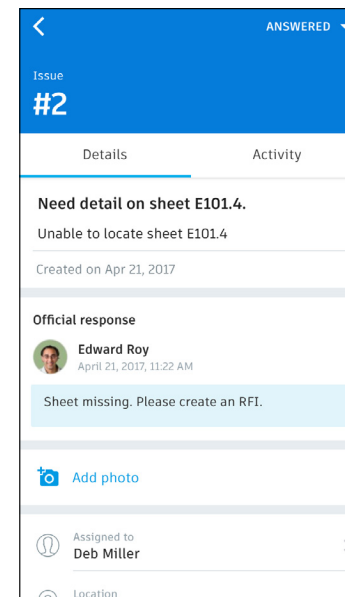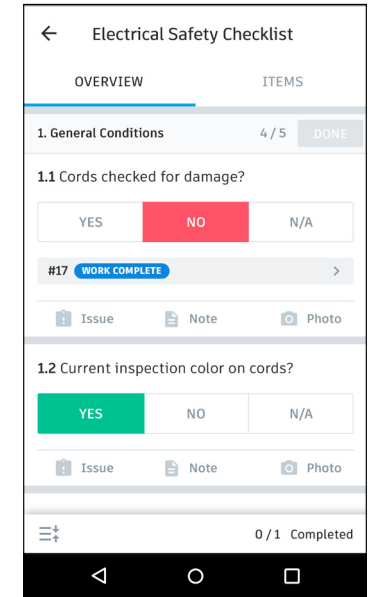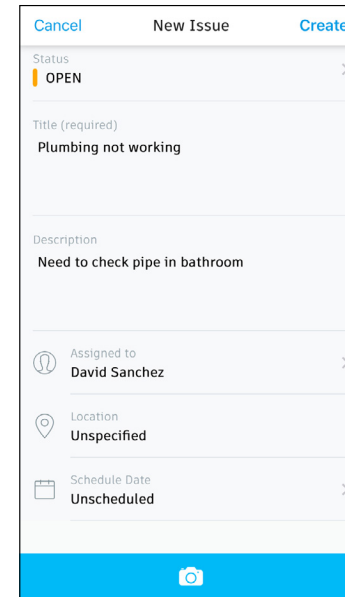
BIM 360 Mobile Capabilities

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.

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®
BIM 360®**

autodesk.com/bim-360